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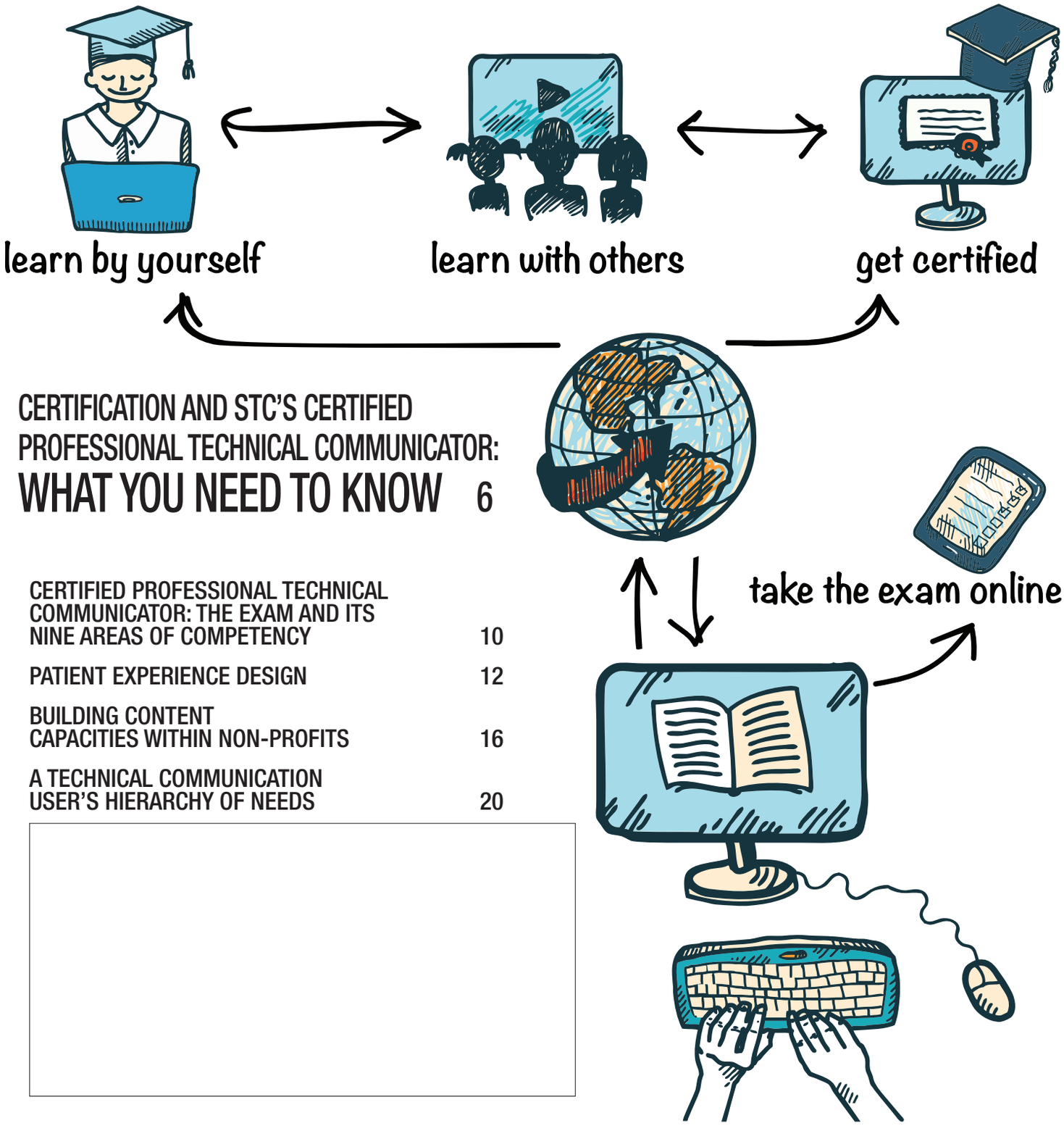

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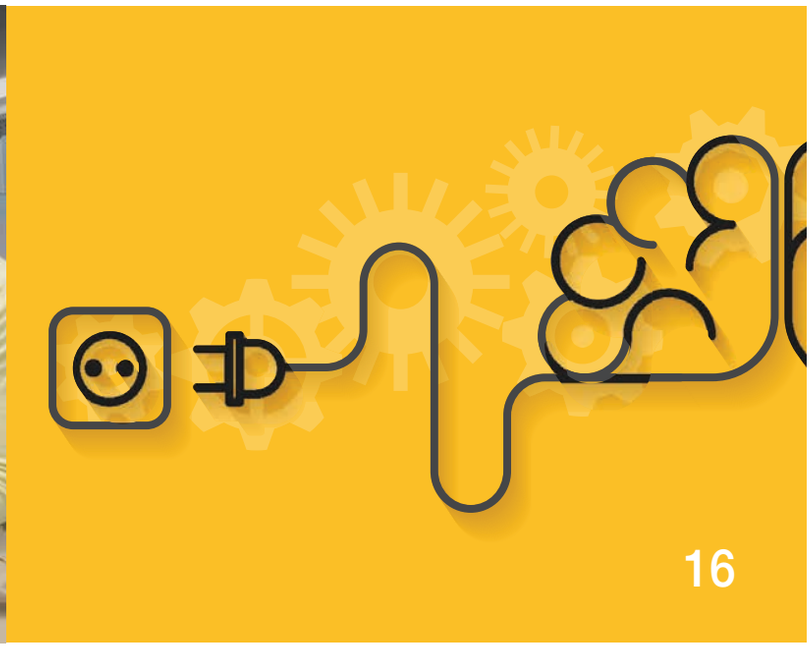

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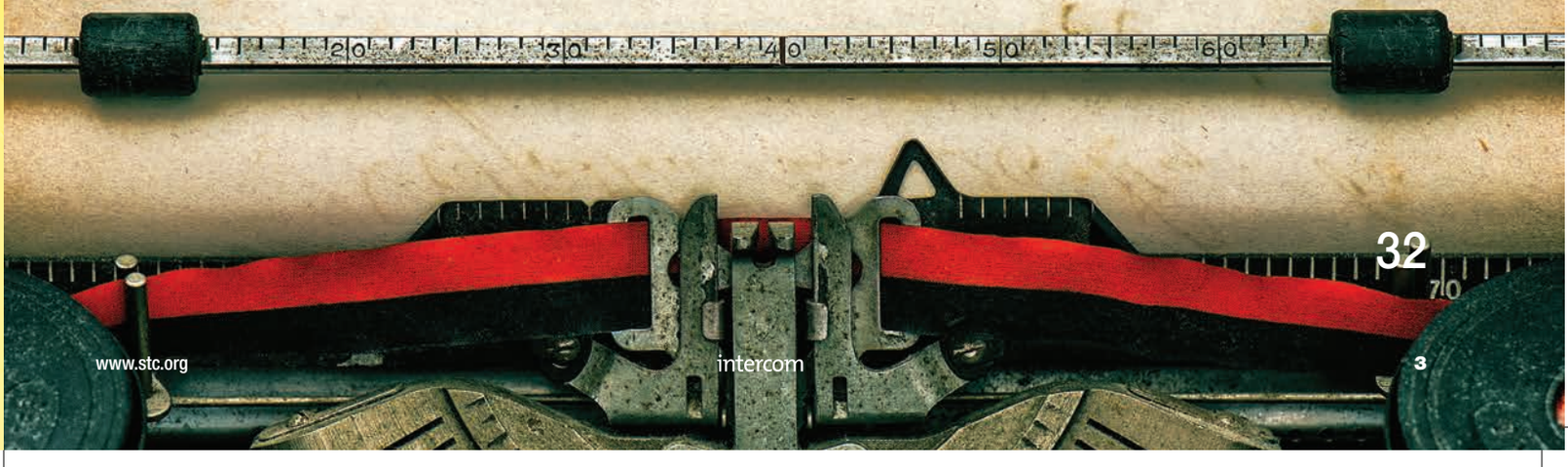

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A Note from the Editor

THE JANUARY ISSUE of *Intercom* focuses on professional development. Have you been wondering about professional certification, how to move into the medical and healthcare field, how to work with nonprofits, or how to model a better user needs framework? If so, then this issue has what you need to know.

Looking for more information on certification? An article by STC CEO Chris Lyons and myself explains what certification is, why STC built the certification program, and what it can do for you and your employer. This issue also includes an article by certification Chief Examiner Craig Baehr on the exam and its nine area of competency. If you've been wondering what the nine competency areas are or how to study and take the exam, this article provides an essential overview.

Interested in the healthcare arena? Lisa Meloncon has provided an article that explains the overlap between technical communication and what she calls patient experience design (PXD). Arguing that PXD provides a defined path for technical communicators to be involved in the development of patient education materials, she explains how skills technical communicators already have easily transfer to communications within the medical and healthcare industry.

Working with a nonprofit? Through eight years of experience with nonprofits, Guiseppe Getto has written an article that explains how technical communicators can help nonprofts build and sustain better online presences and Web content. He provides tactics that technical communicators can use to help organizations with limited resources increase their capacities for building and maintaining effective Web content.

Looking for a new user model? In his article, Ellis Pratt has coined a new content maturity model "a technical communicator's hierarchy of needs." In the model, he focuses from the user's perspective to help organizations understand where users interact with tech comm content and to link goals across project stakeholders at the start of a project in order to get the necessary funding.

This issue also includes a guide to the upcoming 2016 election; information about the Summit Keynote Speaker David Rose and the fun to be had in Anaheim, California; and three columns: one on ethics in edutainment, one on technical communicators as accessibility advocates, and a new advice column from tech comm managers Kit Brown-Hoekstra and Cindy Currie.

I hope you enjoy the first issue of *Intercom* for 2016. I look forward to your comments and thoughts online, or email me directly!

—Liz Pohland
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intercom

Intercom, the magazine of the Society for Technical Communication, is published to provide practical examples and applications of technical communication that will promote its readers' professional development.

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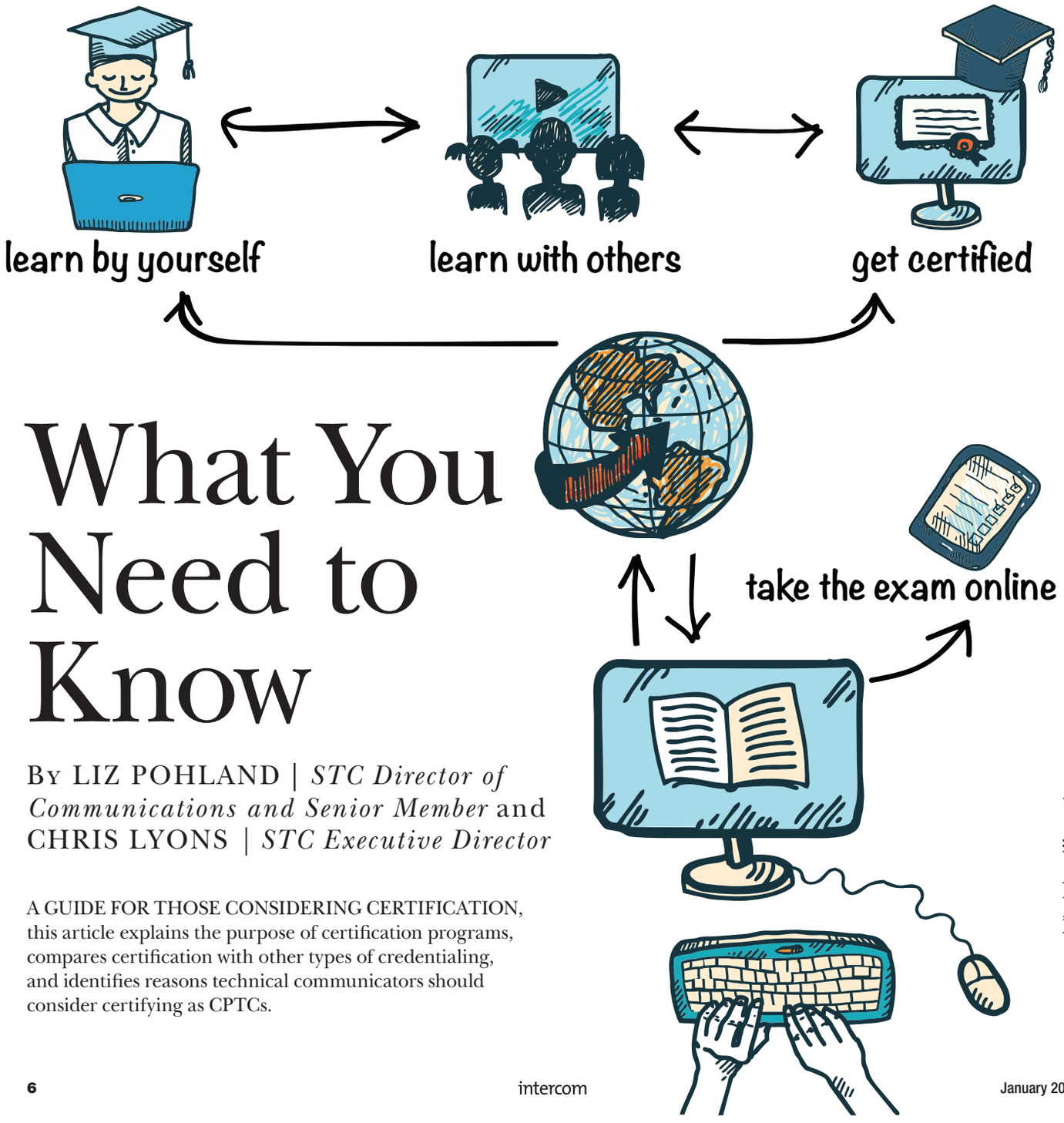
Certification and STC's Certified Professional Technical Communicator:



What You Need to Know

By LIZ POHLAND | *STC Director of Communications and Senior Member* and CHRIS LYONS | *STC Executive Director*

A GUIDE FOR THOSE CONSIDERING CERTIFICATION, this article explains the purpose of certification programs, compares certification with other types of credentialing, and identifies reasons technical communicators should consider certifying as CPTCs.

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What Is Certification and Why Do Organizations Certify?

Any organization can consider creating a certification program for a particular skill or knowledge of an industry or field. Organizations may consider a certification program if: 1) they have a measurable business need to formally validate an individual's knowledge or skill in a particular product or content area; 2) there are no tests or credentials available from other organizations to measure the same level of performance on similar content or products; and 3) verifying a minimum performance capability of an individual is critical to the job (e.g., for safety, health, environmental, or other risk-related concerns).

One of the tasks in designing a certification program is to find a valid driver—a problem worth solving. The first reason most organizations certify focuses on recognizing a professional's accomplishments and improving work processes. Organizations certify individuals to protect the public, confirming that practitioners have or can get the knowledge and skills required to do their jobs safely, efficiently, and effectively. They also certify to validate or enhance the stature of a role or position, to promote continuous improvement, to increase productivity, and to maintain skills and knowledge. Hiring organizations want a certified workforce so they can attract and retain competent staff, establish uniform performance standards to rapidly deploy workers, raise the level of core competencies, create multidisciplinary jobs, and comply with local and international standards.

Since professional certification confirms or validates knowledge or performance capability, it is important that the certifying organization also be recognized as an appropriate body to determine and grant professional certification. This body is often leading or generally recognized and active organizations for professionals in a field. A professional certification created by an individual, an unknown association, or just an organized group would lack credibility.

The Society for Technical Communication launched a certification program for technical communicators in 2011. The goal behind the program was to create preference in the marketplace for certified technical communicators and to validate efforts in learning core skills, best practices, and specific industry standards. STC believes that certification is a powerful tool for driving market recognition and adoption of an essential skill set.

Per a report written in June 2009 titled "STC Certification Drivers," the STC Certification Task Force at the time identified driving factors for a certification program for technical communicators:

- Establish uniform worldwide performance standards.
- Increase employability and salary of certified practitioners.
- Satisfy employer expectations.
- Reduce risk for employers.

Definitions of Credentials

The terms *certification*, *licensure*, *standardization*, *accreditation*, and *certificate* are sometimes used interchangeably in the vernacular, but there are important distinctions between the definitions of each type of credential.

Certification is a voluntary process by which a nongovernmental agency or association grants recognition to individuals who have met certain predetermined qualifications of professional competence specified by that agency or association upon an assessment. Such qualifications may include acceptable performance on a qualifying examination and/or completion of some specified amount or type of work experience in the field. Examples of certifications include STC's Certified Professional Technical Communicator, the American Medical Writers Association's Certified Medical Writer, or the Project Management Institute's Project Management Professional.

Licensure is the process by which a government agency grants permission to individuals to engage in a given profession or occupation by certifying that those licensed have attained the minimal degree of competency necessary to ensure reasonable protection of the public's health, safety, and welfare. Licenses are usually justified to regulate an activity whose incompetent execution would be a threat to the public, such as with conducting surgery or driving motor vehicles. Examples of workers who need licenses to do their work include board certified doctors, lawyers who have been admitted to the bar, commercial licensed truck drivers, and airline plane captains.

Standardization is the process by which a product or service is assessed against standards and specifications, such as the Underwriters' Laboratory seal on electrical fixtures or self audits done by companies that want to show compliance to national or international standards,

Definitions in a Nutshell

- Certification, licensure, and certificates are for individuals.
- Certification is a voluntarily earned designation bestowed by a recognized organization or authority to validate an individual's qualifications to perform a job or task.
- Licensure is a mandatory restriction by law for a professional activity and the use of an occupational title.
- Standardization is directed toward products or processes.
- Accreditation is third-party validation of entire organizations or programs.
- Certificates confirm an individual's acceptable completion of a course or a program of study.

such as American National Standards Institute guidelines and ISO 9000 standards (ASAE 1987).

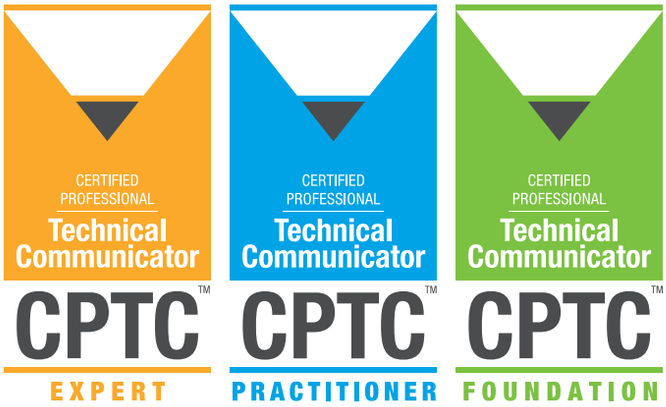
Accreditation is the process whereby an accrediting body grants public recognition to a school, institute, college, university, or specialized program of study having met certain established qualifications or standards as determined through initial and periodic evaluations. For example, engineering and business programs are accredited by specialized organizations that have established performance standards for academic programs in the field.

Certificates are probably the most commonly confused with certification, but they are very different. An easy rule of thumb is a certificate recognizes completion of a defined program of study or a course and recognize completion of specific learning outcomes provided by instruction and training. Certifications award designations to recognize professional achievements from knowledge, skills, and competencies previously acquired. Examples of certificates include short-term programs of study—such as the certificate programs offered by STC and private training and development organizations like Watermark Learning's Agile Certificate (see *www.watermarklearning.com/certification/agile/academic/agile-certificates.php*)—and programs of study involving several courses—such as certificate programs in technical communication offered by the continuing education units of many colleges and universities (see University of Michigan's School of Public Health Certificate Programs, *https://sph.umich.edu/academics/programs-degrees/certificates.html*).

STC's Certified Professional Technical Communicator (CPTC)

STC's Certified Professional Technical Communicator program reopened in December 2015 (*www.stc.org/education/certification/certification-main*). The re-engineered program is a three-tiered professional certification: Foundation, Practitioner, and Expert.

- The **Foundation-level Professional Certification** focuses on knowledge of the field. To achieve the Certified Professional Technical Communicator—Foundation designation, applicants must demonstrate knowledge and understanding of best practices in technical communication by passing an exam. Visit *http://www.apmg-international.com/en/qualifications/CPTC/CPTC.aspx* to learn more about the exam.
- The **Practitioner-level Professional Certification** will demonstrate mastery of applying best practices and leading others in their use. The achievement of the Certified Professional Technical Communicator—Practitioner designation will likely be a test and an evaluation of work product(s).
- The **Expert-level Professional Certification** requirements will be similar to the CPTC program launched in 2012, requiring a set of work products and subject matter expert interviews.



Why Should a Technical Communicator Pursue Certification?

The chief benefit of certification is simple: A certification program creates a preference in the job market for people who have taken the time to invest in themselves—in their skills and experience. For individuals in particular, becoming certified can be invaluable because it provides proof of your abilities, a robust understanding of the knowledge and specialized skills that are necessary to perform with a high degree of competence in a field, and a continuing process for remaining relevant in the field. In every profession, professional certification helps employee, employer, and the consumer.

Employees benefit from professional certification in several ways:

1. *Validation of an employee's skills and knowledge by a third party.* In the case of the Certified Professional Technical Communicator credential, STC provides that validation. Additionally, STC is working with a vendor whose accreditation processes follow ISO standards. For the employee, STC's Certified Professional Technical Communicator certification, with accompanying requirements for continuing education, is a professional milestone that carries weight and credibility among peers, clients, and organizational leaders.
2. *Differentiation from others in the marketplace and the ability to command higher pay.* Professional certification is an important credential on a résumé and provides evidence of qualifications. It denotes a level of competency and is an indicator of commitment and quality performance and output. For those not looking for jobs, obtaining certification may be a requirement for advancement or a way of standing out from peers or competitors and commanding higher pay or more responsibilities.
3. *Engagement and commitment to the field.* On a personal level, the certification process and requirement for annual training forces the practitioner to stay current, work on multiple types of jobs, learn new skills, and network with peers.

Employers also benefit from professional certification.

1. *Validation of an employee's skills and knowledge by a third party.* Professional certification provides a quality marker that helps an employer gauge the effectiveness and qualifications of a potential hire. It reduces risk and simplifies the search through validation of knowledge and by providing a hiring baseline. When professional certification is a requirement in a job posting, it greatly focuses the candidate pool. Since the employer is depending on an independent validation to verify a candidate's skill, it is important that the certification is granted by an established and credible organization such as STC.
2. *Differentiation from others in the workforce.* Employers want their hires to stay current and continue to grow in the profession. Professional certification programs and their related continuing education requirements provide milestones for employees and, after completing a certification qualification, remain a driver of continuing education and training. Employers can use achievement of professional certification as evidence for advancement or pay increases as well.
3. *Engagement and commitment to the field and the business.* Certified professionals with proven knowledge and competency will contribute more to an organization. They may be faster or more accurate workers, and they may be more creative or insightful in solving related business problems. And certified employees provide evidence that an organization's technical communication team is more qualified than that of its competitors.

Benefits of certification include:

Validated Experience: Confirm your experience and competency through certification.

Professional Development: Add certification to your career development plan and distinguish yourself from your peers.

Leadership Recognition: Show employers and colleagues that you are committed to establishing global performance standards for the profession.

Professional Status: Join an elite group of CPTC-certified professionals who have demonstrated their knowledge and proficiency.

Portable Career Credential: Take your CPTC certification with you to new jobs and enhance your employability.

Personal Achievement: Gain confidence in your knowledge and skill and achieve a professional and personal goal.

With certified professionals in the workforce, the consumer is better off as well. Knowledgeable workers result in better communications: instructions are more easily understood, warnings are relayed properly, descriptions are complete, content can be reused, and the device used to access the content doesn't limit the user. For technical communicators, professional certification sets a standard for skills, knowledge, and performance across the field of content work and information products. Ultimately, developing a well-thought-out certification program helps an organization's employees, customers, and members advance the organization's interests, as well as their own. It is arguably the best way to create confidence in the marketplace.

The Society for Technical Communication is fulfilling one of its mandates as an association by creating and sponsoring professional certification for technical communicators. We hope all of our members, academics, students, and other practitioners in the field take advantage of this program.

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Certified Professional Technical Communicator: The Foundation Exam and Its Nine Areas of Competency

By CRAIG BAEHR | *Associate Fellow*

THE FOUNDATION LEVEL of STC's professional certification addresses key terminology, facts, concepts, and techniques in nine areas of disciplinary expertise. These areas encompass a broad range of processes, practices, strategies, and roles that comprise the work of technical communicators and teams they serve on and manage. Foundation-level professional certification in technical communication is designed for entry-level individuals who are involved in technical communication and informational projects or products, who possess working knowledge of the key principles of the profession, and who understand the basic terminology used and theories behind specific practices.

Foundation certification is required to progress to higher tiers. Practitioner and Expert-level certifications will be available in the future.

What are the nine areas?

The nine areas of professional certification in technical communication include: project planning, project analysis, content development, organizational design, written communication, visual communication, reviewing and editing, content management, and production and delivery.

How were they created?

These certification categories build on the previous research and work of task forces and committees, including the STC Certification Commission. The effort included a comprehensive review of the Technical Communication Body of Knowledge (TCBOK) content to determine areas of expertise within the profession. As a collective and collaborative knowledge resource drawing from nearly 600 content topics, it represents a breadth of technical communication knowledge.

A job task analysis survey of STC members was also developed and conducted by an external entity to reach a broader profile of professionals in technical communication. Drawing from the results of the TCBOK comprehensive content review, the survey asked participants to rank the importance of knowledge, skills, and abilities related to process management, researching, design, development, review, and production. It also focused on tasks, importance, and frequencies related to their job responsibilities and knowledge of the profession.

In addition, several panels of subject matter experts were involved throughout the process tasked with the responsibility to review and comment on content related to the nine categories. As a final task, a group of subject matter experts were involved with updating and writing objectives for each category.

What does each area measure?

Project Planning

Project planning focuses on the work involved in planning and managing technical communication work teams and documents through a lifecycle process. It includes process planning, goal setting, progress tracking, and strategic planning activities.

Project Analysis

Project analysis involves the work of identifying readers and document contexts, including the development of reader profiles. This includes identifying types of audiences, users, readers, and their preferences regarding document use and readability. It also focuses on the analysis of document contexts, including working in global contexts and rhetorical situations.

Content Development

This category focuses on the development of content and technical information products. It addresses technical genres, their content, and use, including: memos, technical descriptions and specifications, instructional content, proposals, activity or status reports, and analytical reports. It also focuses on researching, including finding source materials, defining the scope of research questions and methods, and documenting sources and intellectual property concerns.

Organizational Design

Organizational design focuses on guidelines and techniques for organizing and drafting technical documents. It covers organizational patterns and rhetorical moves for introductions and conclusions to technical reports, as well as patterns for specific technical genres including memos, technical descriptions and specifications,

instructional content, proposals, activity or status reports, and analytical reports.

Written Communication

Written communication covers general guidelines for composing content and communicating in written and electronic forms. It covers writing style, persuasion, tone, and general readability. It includes techniques for writing sentences and paragraphs for both print and electronic documents, and in global contexts.

Visual Communication

This area focuses on general visual communication principles and practices, including using graphics, data displays and other kinds of information graphics, such as bar charts, line graphics, tables, pie charts, flow charts, etc. It covers the use of design principles, such as balance, alignment, grouping, consistency, and contrast. It also addresses the use of visual information and related technologies when giving presentations.

Reviewing and Editing

This category addresses reviewing and editing processes and guidelines, and general usability. It encompasses the various levels of editing, including revising, substantive editing, copyediting, and proofreading. Additionally, it covers common grammatical and mechanical errors.

Content Management

This area focuses on managing content of information products, as well as the management of information development teams. It addresses Web content development, including the basic features of Web sites and general guidelines for developing Web-based content. It also covers the uses of social networks, wikis, blogs, microblogs, videos, and podcasts in working settings. From a teaming standpoint, it covers the roles and practices for managing content and roles across a work team.

Production and Delivery

This category focuses on the production and delivery of information products, specifically how project outcomes relate to and inform the development of final production deliverables. It also addresses the importance of setting objectives for final deliverables and using them to measure effectiveness and outcomes of technical information products.

What is the exam format?

The Foundation-level Certified Professional Technical Communicator exam covers each of the nine areas and is based on content from the 5th edition of *Technical Communication Today*, by Richard Johnson-Sheehan (*www.mypearsonstore.com,* ISBN–10:0134419391). Additionally, the Technical Communication Body of Knowledge (TCBOK) content (*www.tcbok.org*) is an informative secondary source for the exam.

The purpose of the Foundation qualification is to measure whether a candidate has sufficient knowledge and comprehension of the technical communication text to act as an informed member of a technical writing or a technical communication team within their professional work or in their organization.

The Foundation exam format is:

- 40 minutes
- 50 multiple choice questions
- 70% pass mark
- Closed book

What are the continuing education requirements?

Continuing education requirements include a wide range of STC-related activities, including attending STC Summit sessions, webinars, and other educational offerings, as well as successful completion of college accredited courses related specifically to technical communication.

Currently, continuing education points may be obtained the following ways:

Event	Points
STC Annual Membership (any type for Foundation certificants)	2
STC Recorded Webinar (self-study)	1
STC Live Educational Webinar (free, sponsored, and community webinars excluded)	2
STC Online Courses	6
STC Summit Full-Day Pre-Conference Course	6
STC Summit Half-Day Pre-Conference Course	3
STC Virtual Summit	4
STC Annual Summit	8
Begin and complete a college accredited course related to the Technical Communication field*	8 points per 3 college credit course

** transcript must be submitted to and reviewed by STC*

As the Foundation program matures, this list will expand to include other activities including non-STC activities hosted by other associations or institutions.

Further Information

You can register to take the Foundation-level Certified Professional Technical Communicator exam by visiting STC's website at *www.stc.org/education/certification/certification-main.* STC members can sit the exam at a discounted price by entering their valid STC member ID at the time of registering for the exam. If you have additional questions about the exam or STC's certification, please visit *www.stc.org/education/certification/certification-main* or email *stc@stc.org.*

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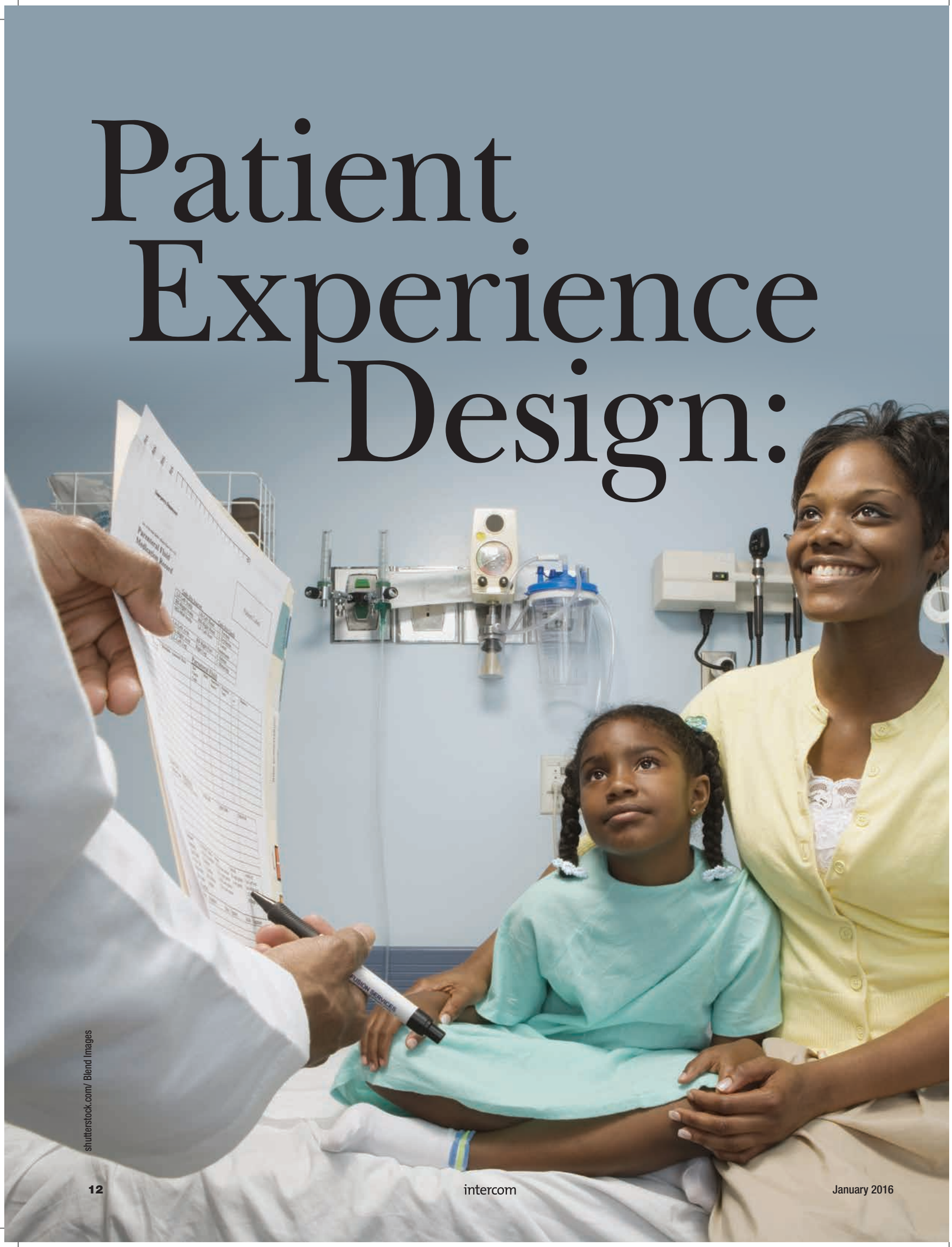
Patient Experience Design:



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Technical Communication's Role in Patient Health Information and Education

By LISA MELONCON | *Senior Member*

TECHNICAL COMMUNICATORS have long worn many hats with many different job titles. The skills we bring to any communication problem can move easily across technical domains. Thus, health information and patient education offer opportunities for an alternate career path for technical communicators. The federal government has identified health communication "as a critical area," as seen in the continuation of this focus in HealthyPeople2020 and the Agency for Healthcare Research and Quality (AHRQ) (*www.ahrq.gov*). Other high-profile nonprofit funding initiatives, such as the Patient-Centered Outcomes Research Institute (*www.pcori.org*) and the Institute for Patient-and Family-Centered Care (*www.ipfcc.org*), also point to the increased importance of communication in health care. The Bureau of Labor Occupational Outlook Handbook demonstrates the demand for health communication professionals, listing the following careers and their career growth for 2010–2020:

- Health educators—37%
- Medical and health services managers—22%
- Health information specialists—21%

More specific to issues directly connected to technical communication, AHRQ has reported that a total of 90 million Americans lack the health literacy and numeracy skills to productively participate and engage in their own health care. And as we well know, technical communicators are adept at producing and designing information that can be understood by specific, targeted audiences. With this growing need for health communication specialists, the question becomes: how do technical communicators participate? What can we do to enter/contribute to this discussion?

The answer? We apply our knowledge of user experience to the area of conveying technical information to patient. The approach? It's something I call patient experience design (PXD), and in what follows, I explain how PXD developed and what it is. I then describe why it matters and provide strategies for how technical communicators can use this approach to move into health communication and patient education careers.

Moving Toward a Definition

Over the last several years as I've done more work in healthcare, and in that work—both creating information and researching communication problems—I've struggled even more to explain what I do to a wide array of collaborators. Most every technical communicator has struggled with the question"what do you do?", but I found this question even harder to answer in the health and medical domains. The difficulty often connected with trying to get people to understand that, while many write health information or patient education materials, having a communication specialist can improve the quality of that information and increase the likelihood of patient understanding and use. For a while I found myself falling back on the tired and partial metaphors found in technical communication's history, using phrases such as "translator" or "bridging the gap between doctors and patients," or using "health literacy" as a catchall term since most health care professionals thinks they know what it means.

But I found these explanations exhausting, incomplete, and totally unsatisfying. Even though I have never been an advocate of neologisms, particularly for the sake of simply putting a new name to something that is fundamentally not new, I found myself creating a new term: patient experience design (PXD). At the start of a project, and for the first time in my experience when I was done describing what I do, everyone in the room understood. The patients, doctors,

nurses, designers, hospital administrators, engineers, and students (from a variety of disciplines) all understood what I brought to the team. So how did I land on this term?

In its landmark 2001 report *Crossing the Quality Chasm*, the Institute of Medicine (IOM) identified patient-centeredness as one of six aims for the healthcare system. They defined patient-centeredness as providing care that is respectful of and responsive to individual patient preferences, needs, and values, and ensuring that patient values guide all clinical decisions. This emphasis and fore fronting of the patient is reminiscent of the primacy of the user in user experience. Thus, patient centeredness and user experience *intersect and complement* one another, which makes merging user experience with patient centeredness an easy and logical next step. See Figure 1 for one conception of how different domains and skills within those domains intersect to form PXD.

Working with patient information and education materials, I kept returning to user experience, such as usability, audience, interface design, and plain language. Moreover, user experience recognizes the importance of the person's attitudes, behaviors, and emotions as they interact with a company or a product. All of these things are key factors in whether and how a patient will use and engage with information and education materials.

While patient safety and healthcare technology research has begun to integrate UX perspectives, those creating and researching patient information and education materials have been slow to adopt the user experience framework. Technical communicators can intervene in patient experiences by incorporating user experience principles and practices and through these practices improve patient engagement. In this sense, patient engagement can be seen as reducing no-shows to appointments, improving medication adherence, or increasing literacy and numeracy of specific information related to their health, or improving the efficiency of patient record portals.

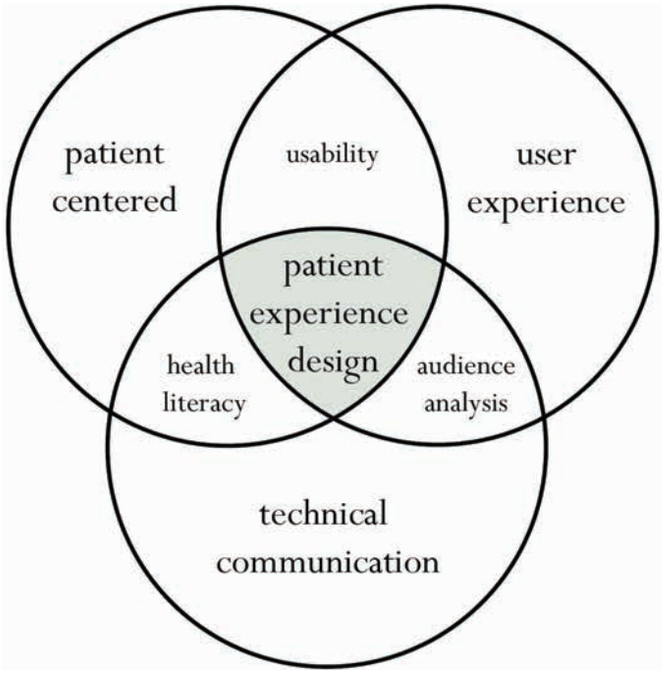

Figure 1. Domains of PXD

Defining PXD

Patient experience design (PXD) is a collaborative space for patients, families, caregivers, and healthcare professionals to provide their insights and knowledge into the information design process and distribution of patient information and education materials. This information design process should be iterative as materials are written and designed and then distributed and, most importantly, when any changes in clinical practice can affect information and outcomes. Unlike other industries that often claim true user experience design is too expensive because of the time and effort it takes to find and incorporate users into the process, health care has a captive system that, with minor alterations, also has access to the exact population of users needed to test and help design patient information.

PXD is concerned with improving patient engagement and outcomes through education and communication that is focused on patient experiences and knowledge in conjunction with the usability of information and technology. Patient experience design incorporates an adaptive collaboration model between patients and other participants (such as doctors, researchers, technical communicators, nurses, clinicians, and others) in the design of patient education materials, and at its center it focuses on the quality of life and perceptions of the patients. This orientation means the primacy of how information is designed has the potential to improve health literacy, health numeracy, and patient comprehension.

Health information must be timely, accessible, accurate, and understandable. The proliferation of information found online and accessed via mobile devices increases this demand. Thus PXD can be an integral part of overall health outcomes because it can help patients

- Better understand their own health and treatment,
- Maintain their own health records, and
- Facilitate care options by participating in shared decision making.

Patients who can understand, maintain, and facilitate their care more easily could potentially achieve two important goals in healthcare: getting better outcomes for patients through compliance, particularly for patients with chronic conditions, and through prevention by reducing overall heathcare costs. Providing patients with health information that they can use potentially enables both of these, and both are enabled by PXD.

A particular hallmark of PXD is its ethical dimension. As Carolyn Miller has argued, the creation of technical information is a matter of conduct rather than simply a matter of production. In other words, communication, particularly health communication, is a social action

connected to other actions and activities that necessitates that the information can be used by those who need it most. This necessity has an implicit and explicit ethical dimension and moral obligation.

Importance of PXD to Technical and Professional Communication

PXD provides a defined path for technical communicators to be involved in the development of patient education. The field has long advocated for taking our skills and expertise into new areas, but in this case, PXD provides us the moment to better articulate the specialized knowledge we have in a new arena. Rather than simply calling this movement an extension of technical communication, I encourage technical communicators to think of it as the advancement of foundational skills and concepts into a new arena—thus, an ideal articulation of the work that we do.

In his editorial for the August 2014 issue of *Technical Communication*, Menno de Jong encouraged technical communicators to move toward theory. One area that he posited could be a theoretical direction is examining the relationships of usability with the overall user experience. A potentially rich area where this sort of exploration can be done is in the healthcare sector, where patient's interactions with information and technologies can provide a delineated approach to understanding their appreciation of how information and technology guide their experiences of health care. We have the potential to take existing ideas and build new theories and/or to test existing theories in hopes of creating generalizable knowledge. We can also improve scientific research methods to better account for the qualitative aspects that are necessary to fully test patient experience design. The vast amount of data that can be collected throughout the process should shed light on how to design patient experiences.

PXD is also important in a strict usability sense as more and more applications are being made in the healthcare market. The usability and patient experience of such things as electronic health records, websites, apps, and patient portals fully fit into the realm of technical communication. But when these things are used in addition to highly specialized information, then it becomes a paramount concern that technical communicators become involved. Through patient experience design, we have the opportunity to be part of the entire process including developing ways to "test" the comprehension of patient information from a variety of sources. For example, nutritional information is often unheeded because in many cases the patient's experiences, existing knowledge, biases, and emotions haven't been fully considered, nor have the complex cultural dimensions of food and eating. By focusing on PXD, technical communication could potentially provide a huge value added dimension to the delivery of care.

Patients' perceived use or non-use of information guidelines, medications, protocols, etc. has long been a concern to medical practitioners, and most interventions designed to help alter or change behavior have had little effects. For example, areas such as the underuse of certain technologies like personal health records, daily checks of blood pressure, or those diabetics who fail to test as often as necessary are all important areas where technical communicators using PXD could intervene. In each of these examples, a focus on PXD following the long-standing and tested techniques of usability could provide important dimensions to delivering health care. The patient's perception, emotions, knowledge, and the perceived usefulness of a product, information, medication, or technology is key to the potential of adherence, compliance, or if a behavior change can improve health outcomes.

How to Move into PXD

Using PXD to make the move into health communication and patient education is not as difficult as one might think. The medical healthcare complex has numerous opportunities for entryway into this area. Technical communicators have the skills necessary to work as patient experience designers in relation to patient education materials, internal communication specialists, marketing specialists, public relations, Web content strategists, and communication directors. In other words, hospitals, insurance companies, health practitioner groups, physical therapists, lab companies, and home health companies are just a few examples where technical communicators can look to find jobs that take their technical writing skills and move them into a different direction. Recent alumni of degree programs in technical and professional writing who work in the healthcare industry have job titles such as communication specialist in patient services, director of publications, health communication specialist, medical writer, Web editor for special projects (in a hospital system), and human resource communication (in an insurance company).

Other than knowing where to look, you can build a mini-portfolio in this area by volunteering at local nonprofits or in free community centers or clinics that offer health and wellness services. You can take a class on medical and science writing, many of which can be found in technical and professional writing programs and most of which have client-based projects that will give you an idea of whether this is a job for you. And finally, the next time you or a family member goes to the doctor and you're handed some sort of information (or told to read something online or watch a video), you can offer to update that material (because chances are it needs it!).

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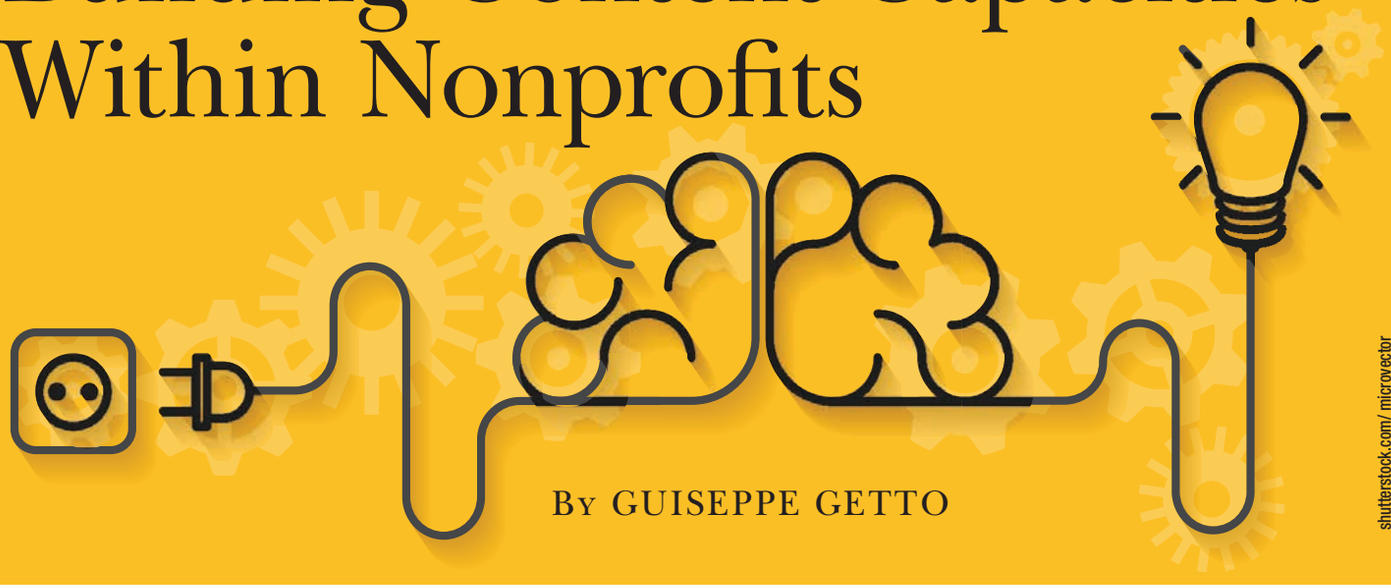
Helping Strategy: Building Content Capacities Within Nonprofits



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By GUISEPPE GETTO

NONPROFIT ORGANIZATIONS (NPOS) provide necessary services to a variety of communities in a variety of locales. They work in such fields as domestic violence prevention, homelessness prevention, and hunger prevention. Internationally, they typically take the form of non-governmental organizations (NGOs) and make services available in the developing world that struggling democracies cannot provide. And thanks to the proliferation of Internet-based technologies, NPOs and NGOs alike are now able to interact with core audiences from all over the globe via cheap, readily available platforms such as open source content management systems (e.g., Drupal, WordPress, and Joomla!) and social media.

According to recent research, however, nonprofits are *not* effectively making use of these technologies to reach core audiences, although they are attempting to do so (see Kenix; Zorn, Flanagin, and Shoham). Readers who have volunteered at local nonprofits have probably encountered a familiar story: the board of the organization finds out that their latest volunteer is something called a "technical communicator." The board gets from this job description that the new recruit is an expert in all things technological and asks, excitedly, "Can you help us with our website?" Chances are, the website was set up by a volunteer who no longer works at the organization. Sometimes the organization paid an exorbitant fee to a local Web designer who probably made an ineffective design and, once the initial contract ended, locked the organization out of their own site pending a new contract.

Over the past eight years working with nonprofits as a researcher, consultant, and service-learning instructor, I have encountered this kind of story in nearly every organization I've worked with. Such experiences suggest that nonprofits who want to develop and maintain an effective Web presence face serious obstacles, including:

- lack of sufficient financial resources to hire a qualified consultant,
- lack of sufficient expertise to build high-quality websites and to effectively manage Web content, and
- high rates of overturn for volunteers and staff.

Within this context, a pressing need exists in many communities for nonprofits who want to develop a better Web presence, but lack the capacity to do so.

At the same time, well-meaning technical communicators who possess needed technical skills can actually make matters worse by providing nonprofits with solutions that organizations can't maintain on their own. The simplest organizational website must still be updated from time to time. Social media accounts need a steady flow of fresh content to maintain visibility. The question arises: if and when the technical communicator is no longer able to work with the organization, even for a short period of time, who will sustain the organization's Web presence? Or will the technical communicator simply become another character in the organization's story of volunteers and consultants who helped for a time and then left the organization in a worse mess than when they started?

Over the past eight years, I have collected some tactics that technical communicators can utilize to be of real use to nonprofits by helping organizations increase their capacities for building and maintaining effective Web content. These tactics include methods for helping nonprofits to identify appropriate online audiences and channels. Before discussing these tactics in-depth, I explain below how emerging technologies are disrupting the nonprofit marketplace, and why effective Web content is the key resource nonprofits need to develop.

How Emerging Technologies Are Changing the Capacities Nonprofits Need to Sustain Themselves

Like many organizations, nonprofits are struggling to keep up with a changing communication landscape. In the for-profit world, the prestigious digital consulting firm McKinsey & Company has developed a digital quotient (DQ) for measuring how effectively a business is in making use of digital technologies to support key business processes, such as advertising, selling, and communicating with internal and external stakeholders. Over the last five decades of research they have found that the "topple rate," or the rate at which leaders within a given industry risk displacement by up-and-comers, has increased by 40%. This means that nearly half of major businesses face serious financial setbacks if they fail to take advantage of emerging technologies. Further, McKinsey & Company posit leadership and strategy as two of the key characteristics of companies that successfully adopt emerging technologies to stay on top of their respective markets. Essentially, if managers and executives within a company don't see the value of emerging technologies and build a company culture around them, then the company is unlikely to successfully embrace such technologies and is likely to face negative consequences as a result.

Although we don't have reliable data to tell us what has happened to the digital quotient of the nonprofit sector in the past five decades, smaller-scale research suggests a similar trend. Theodore E. Zorn, Andrew J. Flanagin, and Mirit D. Shoham surveyed more than 1,000 nonprofits in New Zealand and found that many organizations utilize tools such as email and simple databases for stakeholder engagement, but have failed to successfully adopt websites as a key communication venue for reaching audiences. Why? Zorn, Flanagin, and Shoham tracked a variety of variables in their survey data and found that decision-maker knowledge and leadership were two key predictors of the extent to which a given organization adopted new technologies. Like for-profit organizations, it appears that nonprofits whose leaders fail to acknowledge and embrace the possibilities of emerging technologies also risk falling behind in an increasingly digital world.

With limited research on the topic, we don't know why nonprofits often fail to build a successful Web presence, or even how many organizations succeed in doing so. More research is required to assess the state of nonprofit websites for key performance indicators (KPIs) such as: sustainability, effectiveness of written content, sharability of content, visual design, usability, and strategic use of content. We also need research into what nonprofits *value* when it comes to emerging technologies. Do nonprofits see the need to embrace emerging technologies? If so, why do they struggle to do so? Is it really technical or financial capacity, or, as the above researchers have suggested, are knowledge and leadership within organizations the deciding factors?

One such research project I am currently conducting, tentatively entitled *Helping Design*: *Building Digital Capacities Within Nonprofits,* will hopefully help answer some of these questions. The study will consist of a series of focus groups with nonprofit leaders local to Pitt County, North Carolina, an impoverished area that boasts a surprising number of nonprofits (at least 50 at last count). Over the past two years, local organizations have come to me for help with communication problems ranging from ineffective website designs to help building a strategy for social media content. I have mostly served these organizations in an ad-hoc fashion, often by inviting them to partner with me for a one-off research, service-learning, or consulting project to help them build capacity. *Helping Design* will attempt to devise a larger-scale solution, including the possibility of ongoing learning opportunities for nonprofits provided through East Carolina University, my home institution. Ultimately, I hope to create a sustainable resource network for nonprofits that they can use to improve organizational capacities related to the use of digital technologies. As I suggest below, however, new shifts in thinking regarding what makes a Web presence effective also spell a potential solution for nonprofits who want to increase their digital quotient: content strategy.

Content Is the Key

In my experience, one of the core capacities that nonprofits, and many organizations, struggle with is the ability to develop and maintain a consistent content strategy. A content strategy can be thought of as an organizational plan for developing, curating, and delivering consistent, reliable content. In this context, content can be thought of as useful information for core audiences. One specific venue where content strategy comes into play is in the organizational website. As Kristina Halvorson and Melissa Rach reflect in their book *Content Strategy for the Web:*

> While organizations have struggled for decades—centuries, even—to make sense of their content, they were always able to keep the chaos (and consequences) to themselves. Then came websites, which created the perfect content strategy storm. Suddenly, organizations had to put all of their content (product info, investor reports, press releases, etc., etc.) in one place. For the first time. For all the world to see. And it hurt. (Halvorson and Rach, xvii)

Content existed in various forms before the advent of digital technologies, in other words, but the way in which that

content is communicated to core audiences has changed due to the large-scale adoption of these technologies.

This bears out in my experiences working with nonprofits. There are few organizations over the years that I have encountered whose leaders, staff, and volunteers suffer from a lack of content. On the contrary, organizations are typically awash in a sea of information: mission statements, photos from events, descriptions of programs, logos, calendars, grant applications, etc. Organizations struggle to *manage* and *deliver* this content, particularly online. They often don't have a good understanding regarding what effective Web content looks and sounds like. The pages of their website are filled with lengthy paragraphs developed during board meetings. There are few, if any, images on their website. Or sometimes the website is a slough of images that all compete for attention. The organization's social media accounts have barely been used, or sometimes they are jammed full of posts that demonstrate no discernible relationship to one another. Regardless, it is clear the organization suffers from a lack of *strategy*, not content. The question then arises: how can professionals who are experts at effective communication help an organization that struggles with this very skill set?

How Technical Communicators Can Help Nonprofits Communicate More Effectively with Key Audiences Online

When asked the above question by professionals from various walks of life over the past several years, I respond that the most impactful thing they can do for any nonprofit is to help the organization develop a sustainable content strategy. The question becomes: what does such a strategy *look* like? In answer to this question, I have developed a freely available template for building a content strategy that I call the "Social Media Strategy Template." This document is available for download in Google Doc form at *http://bit.ly/1M3Yd3U*. The document includes my list of the core components of a content strategy:

- *Goals:* what is the organization trying to achieve through its content?
- *Formulas:* what components go into different types of content?
- *To dos:* when should core content-related tasks be performed?
- *Accounts:* what digital accounts should be used to deliver content?
- *Professional associations:* what other organizations and channels is the organization affiliated with that can be mined for content-related initiatives?

In each section of the document, I have included jargon-free boilerplate language to help introduce users of the document to each of these core elements. My goal is to help users to develop and deploy their own content strategies.

The first thing that readers should notice about this document is that it is not called a *content strategy* template. This is purposeful. In my experience, nonprofit leaders, staff, and volunteers have never heard the term *content strategy*, but they have probably heard of social media. Social media is also one of the fastest-moving, and shortest-lived, forms of content an organization needs to develop. In my experience, helping organizations focus on social media often creates a natural workflow for other forms of content. When thinking about what links to post to social media, for instance, technical communicators can encourage nonprofit personnel to consider where content lives in their organization. What happens when an event is being hosted by the organization? Where is the event information currently being advertised? Is it possible to develop a Google Calendar or blog so that when new events arise, they also create the opportunity for sharable content? Such questions can help organizational personnel to think strategically regarding what they can realistically do with available resources.

Readers will probably also notice that "audiences" is not a distinct category within this template. This is also purposeful. Although consideration of audience is key to any form of effective communication, my experience is that emerging technologies make it difficult for nonprofit personnel to discern audiences. Is an audience someone who follows you on Twitter, for instance? Or is it a subscriber who receives an email newsletter? Rather than speaking of audiences as discrete entities, then, I encourage nonprofits to think of them as always connected to a channel. In the Social Media Formula section of the template, for instance, I include the following language:

> As a rule, you don't want to make every post about selling something, or asking for donations if you're a nonprofit. In fact, probably only about 10% of your posts should be directly about selling. Remember: you're building relationships, not trying to sell. Relationships are the way to build towards new sales.

Here I am replacing the static notion of an audience as someone you communicate with on a one-to-one or one-to-many basis. Instead of audiences, I discuss relationships and relationship-building. This tends to help nonprofits think about concrete types of relationships they might develop, including:

- connecting with like-minded people and organizations on social media,
- linking to someone else's content, and
- using keywords to help users find content they might be interested in.

Focusing on relationships helps nonprofits to understand that contemporary media are often interaction-based. They are meant to encourage sharing, linking, and searching. The relationships built around online content are what draw in modern audiences. Users want to find what they are looking for when they browse content online, whether via social media, search engines, email newsletters, or directly

on organizational websites. If organizations don't know what their audiences are looking for, and what they expect to find, it is impossible for them to deliver appropriate content.

This is why the template is broken down into manageable sections, including goals, a to-do list, and a list of organizational accounts. I often find that nonprofits struggle with discerning the components of an effective content strategy. Nonprofit personnel often ask me questions such as: Where does good content come from? Who makes it? Who sends it? Such questions are best answered in the most pragmatic means possible, typically by directing personnel to various content sources, accounts, and types of interaction. This is why I include a list of suggested accounts in the template that organizations might consider creating:

- open source content management systems (e.g., WordPress, Drupal, Joomla!),
- free social media accounts that can be used to represent organizations (e.g., Twitter, Facebook, LinkedIn, Google+), and
- free tools for identifying, sharing, and managing content (e.g., Hootsuite, Keyword Eye, Flickr's Creative Commons).

Many clients over the years have been surprised to learn how many resources for developing and sharing content are currently available online for free. More importantly, however, these components help organizations to focus less on the nitty-gritty details of their content strategy and more on big picture aspects including setting realistic goals, building a weekly workflow for content management (to-do lists), and networking with other organizations.

Finally, listing all this information in one place where staff and volunteers have access can help solve the problem of overturn. If the volunteer currently assigned to run Twitter leaves the organization, there is a risk that the account will go dead, but at least the organization won't be locked out of their own account, because all passwords are included in the documentation. This documentation can grow and change as the organization's content needs grow and change, which is why I make it available in a Google Doc. Rather than delivering a print document to clients, I set up an online forum to encourage them to update and interact with the document as needed.

Take Aways: Strategy Matters More Than Technology

Hopefully I've provided some simple tactics that technical communicators can use to help nonprofits develop robust content strategies. I hope I've also communicated the importance of putting strategy before technology. There are a variety of free or low-cost technologies that nonprofits can use to interact with their core audiences online. The real test, however, is can the organization effectively make use of these technologies to grow their Web presence. As I like to tell my clients: technology is the least important part of their Web presence. Strategy is the most important part.

Such a shift should encourage technical communicators and their nonprofit clients to think carefully about adopting expensive content management systems, paying developers to build complex organizational websites, and adopting other resource-draining solutions. I have encountered scores of organizations who are terrified of digital media because they have sunk thousands of dollars into emerging technologies and have come away with nothing to show for their investment. Many times, the best thing a technical communicator can do for a nonprofit is to have a very frank discussion with personnel regarding what the organization has the capacity to maintain. The best plans in the world will fall short if they outstrip organizational capacity.

This is why if technical communicators wish to build consulting relationships with nonprofits, I highly suggest a maintenance-based or hourly service, rather than a deliverable, unless this deliverable comes with solid documentation. Helping an organization curate content via a freely available WordPress site is probably sustainable for both the consultant and the client. Even better is creating documentation that explains to clients how they can maintain the site on their own, which leaves nonprofit personnel with peace-of-mind, should the relationship decay. This is also important if technical communicators want to volunteer some of their services. Volunteering can easily become unsustainable if there is no clear exit plan for the volunteer. Regardless of the specific form work takes, however, technical communicators who help nonprofits develop sound content strategies will be contributing an essential service to organizations who contribute essential services to others.

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SUGGESTED READING

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A Technical Communication User's Hierarchy of Needs

By ELLIS PRATT

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AT THE TECHNICAL COMMUNICATION UK 2015 conference, one of the presenters, Rachel Johnston, mentioned the idea of creating a content maturity model. I thought I'd take this idea further to see if I could develop a model that illustrates a hierarchy of needs for users of technical communication.

I used the phrase "a technical communication user's hierarchy of needs," because I wanted to create something that considered technical communication from a user's perspective. I wanted organizations to consider the different points where a user interacts with technical communication content, the information they need, and the value this content gives them.

The purpose of the model was to help organizations at the initial planning stage of a project and to assist technical communicators with making the case for a sufficiently large budget.

A Hierarchy of Needs

The idea of a hierarchy of needs assumes what's provided must meet the basic user needs before it can satisfy higher-level needs, if it is to be successful. For example, organizations must enable users to complete tasks before they consider whether the content is aesthetically pleasing.

The categories in our model's hierarchy roughly correspond to Peter Morville's "User Experience Honeycomb," as well as the common factors in product design. At the bottom, we have the bare minimum, or what's required to avoid litigation. As we move up the pyramid, we increase the utility, usefulness, and aesthetics. Toward the top, we have an information system that is intuitive to use, enables users to be in a peak state called flow, and contributes to the brand image and evangelism of the product.

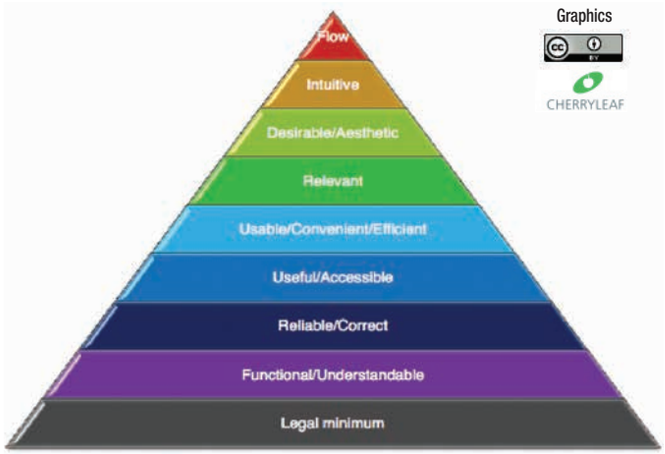


Figure 1. A technical communication user's hierarchy pyramid

Mapping the Hierarchy to Technical Communication Products

I can connect this hierarchy to the different types of content you see in technical communication. For example, if an organization wants its technical communication to enable the product to be intuitive to users, the model's hierarchy can help them realize that providing a basic PDF manual probably won't be enough.

In the diagram in Table 1, the hierarchy is placed in the left column. To the right of that are the types of technical communication outputs that correspond to those levels of capabilities.

Flow	*Are users able to be fully engaged with their tasks?*	Embedded Help Adaptive content Intelligent agents Augmented Reality
Intuitive	*Is it so easy to use it feels intuitive and natural?*	Intelligent content Faceted Help Filtered content Wizards & onboarding screens
Desirable/Aesthetic	*Is it nice to look at and aesthetically pleasing?*	Consistent branding, and tone and voice
Relevant	*Is it relevant to the user's situation?*	Contextually aware content
Usable/Convenient/ Efficient	*Is it easy to use? Can use cases be performed quickly?*	Multiple outputs Managed, curated and edited content Table of Contents Indexed & searchable
Useful/Accessible	*Is it useful?*	Online Help/Web based Help Integrated with product/callable from product Videos
Reliable/Correct	*Is the information reliable and correct?*	Complete body of knowledge Reference guides Terminology guides & glossaries
Functional Understandable	*Can it be used to achieve its purpose?*	Task-based information Localized to language FAQs PDF and paper manuals System requirements Installation guides
Legal minimum	*Does it meet the legal requirements?*	Legal disclaimers Warranty information Safety notices Certificate of conformance

Table 1. A technical communication user's hierarchy map

This table can act like a wine list. You can select only the outputs listed toward the bottom if you wanted something analogous to fermented grape juice. Equally, if you wanted the technical communication equivalent to the finest wines available to humanity, you could provide all the outputs up to the top to the hierarchy.

Integrating the Model with Other Models

I arranged the model in this way so that I could also use it to integrate with similar models from content marketing, information development, and product design.

One popular model used in content marketing is the customer engagement model. This defines the depth of the relationship a customer has with a brand. The model typically describes four stages called attract, convert, sustain, and advocate.

If I integrate our hierarchy of needs with the four stages of the customer engagement model, I can create a diagram that looks roughly like this:

	Attract (Learn & try)	Convert (Buy)	Sustain (Use)	Advocate (Evangelise)
Flow				✔
Intuitive			✔	✔
Desirable/Aesthetic		✔	✔	✔
Relevant		✔	✔	✔
Usable/Convenient/ Efficient	✔	✔	✔	✔
Useful/Accessible	✔	✔	✔	✔
Reliable/Correct	✔	✔	✔	✔
Functional/ Understandable	✔	✔	✔	✔
Legal minimum	✔	✔	✔	✔

Table 2. A customer engagement model

The purpose of doing this is so you can use the diagram to show what technical communication deliverables will be needed at each stage of customer engagement. Where there are ticks in the table, you could replace these with a list of the outputs that will need to be provided. Again, this could help with making the business case for technical communication. For example, you could say something to the effect of, "What we're providing today is good enough to attract customers, but, if we want to sustain the use of our product, we'll need to provide these other outputs."

Another model that could be integrated is the technology adoption curve. This model describes the adoption of products by defined groups. The first group of people to use a new product is called "innovators," followed by "early adopters." Then come the early and late majority, with the last group to eventually adopt a product called "laggards."

Innovators may be willing to accept a product that's rough around the edges, with minimal documentation, in exchange for early access to the product. Other users will want and expect more.

	Innovators	Early Adopters	Early Majority	Late Majority	Laggards
Flow					
Intuitive					✔
Desirable/Aesthetic			✔	✔	✔
Relevant			✔	✔	✔
Usable/Convenient/ Efficient		✔	✔	✔	✔
Useful/Accessible		✔	✔	✔	✔
Reliable/Correct	✔	✔	✔	✔	✔
Functional/ Understandable	✔	✔	✔	✔	✔
Legal minimum	✔	✔	✔	✔	✔

Table 3. A technology adoption curve

Potentially, the model also could be mapped to personas, in order to identify which technical communication deliverables an organization will be needed for each persona type.

This model could be integrated with models already in used in technical communication, such as the information process maturity model (developed by Dr. JoAnn Hackos) and Hargis et al.'s 1998 quality checklist system. However, my goal is to focus on the value to the user and the organization, rather than the processes by which I get there. This is a model that ideally will be used at the beginning, in the budgeting and planning stages, rather than at the end.

Using the Model

I've made the model and the images above available under a Creative Commons Attribution license. You can download them from my blog at *www.cherryleaf.com/blog/2015/10/a-technical-communication-users-hierarchy-of-needs*. So far, the response to this model from technical communicators has been positive. Its purpose is to help technical communicators provide a plan that links directly to the goals of content marketers, product designers, and others within the organization. It's likely this model will need refining and developing, so I welcome any comments, suggestions, disagreements, or any other feedback.

ELLIS PRATT (ellis@cherryleaf.com) *is director and help strategist at Cherryleaf, a technical writing services and training company based near London, in the United Kingdom. He has over 20 years' experience working in the field of documentation, has a BA in business studies, and is an associate of the Institution of Engineering and Technology.*

Final Slate: Meet the Candidates Running in the 2016 Election

THE STC NOMINATING Committee (composed of members Cindy Currie, Donn DeBoard, Viqui Dill, Marta Rauch, and Chair Alan Houser) is pleased to announce the final slate of candidates for the 2016 Society election.

President

Adriane Hunt will automatically succeed from the office of Vice President

Vice President

Alyssa Fox

Rhonda Truitt

Secretary

Jackie Damrau

Kirsty Taylor

Director

(two positions to be elected)

Alisa Bonsignore

Liz Herman

Todd DeLuca

Robert Perry

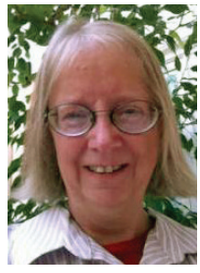
Rajdeep Gupta

Nominating Committee

(two positions to be elected)

Rick Lippincott

Elizabeth O'Neill



Lori Meyer

Becky Todd

Congratulations to the candidates, and thanks to all STC members who expressed interest in running for office. The Society election is scheduled to open on 29 February and close on 9 March 2016. To be eligible to vote, members must have paid their dues by **1 February 2016**.

2016 Election Website Is Now Live!

Detailed information about the candidates, plus an online Candidate Q&A forum, is now available on the STC Election website (*www.stc.org/election*).

Please visit the website to learn about the candidates, and use the Candidate Q&A forum to review the candidates' answers to questions posed by the Nominating Committee. **Members are also invited to pose their own questions of the candidates.**

In the coming weeks, watch STC's Notebook blog and your email inbox for messages from the individual candidates, as well as links to other information about the individuals running for office.

Email *stc@stc.org* for more information.

David Rose Announced as the Technical Communication Summit 2016 Opening Keynote Speaker

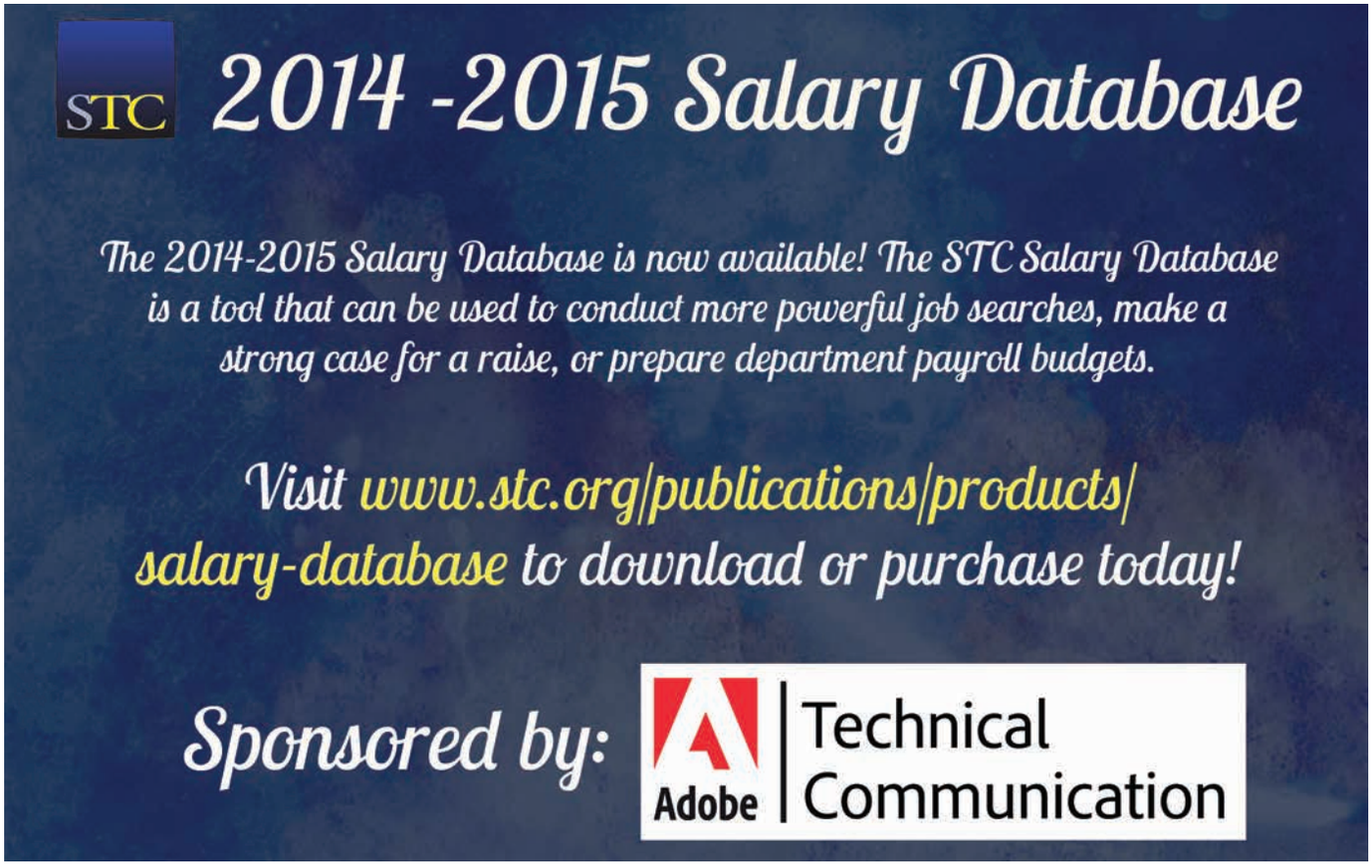
STC IS PLEASED to announce David Rose as the opening keynote speaker for the 2016 Summit. Kick off your time at the Summit with an engrossing discussion from Rose, titled "The New Vanguard for Business: Connectivity, Design, and the Internet of Things."

The Internet of Things is the hottest topic of the moment—a shift predicted to be as momentous as the impact of the Internet itself. In this mind-opening talk, Rose explains how to get in on the ground floor of the Internet of Things or, as it's known in the manufacturing sector, Industry 4.0 (the fourth industrial revolution). He describes how products are poised to become services, and how we will be creating new user experiences, not new technology. What about a world where data from objects as diverse as umbrellas, fridges, and gas tanks all flows through the Internet? We are truly at the frontier of a new, hyper-connected future: and MIT Media Lab's David Rose is our guide.

If you own a business, if your company makes a product, if you are involved in manufacturing, supply chain management, environmental monitoring, transport, retail, health care, urban planning, architecture, design—literally any industry—your sector will be affected. How can you embed connectivity and productivity into your product? It's time to revolutionize the way your company thinks about technology, design, and making money.

Rose is an instructor and researcher at the MIT Media Lab, and the author of the preeminent book on the Internet of Things, *Enchanted Objects: Design, Human Desire, and the Internet of Things*. He holds patents for photo sharing, interactive TV, ambient information displays, and medical devices. His work has been featured at the MoMA, and covered in *Wired*, *The Economist*, and on The Colbert Report.

David Rose's keynote takes place on Sunday evening, 15 May, at the Anaheim Marriott, followed by the Welcome Reception. For more information and to register, visit *summit.stc.org*.


STC
2014 -2015 Salary Database
The 2014-2015 Salary Database is now available! The STC Salary Database is a tool that can be used to conduct more powerful job searches, make a strong case for a raise, or prepare department payroll budgets.
Visit www.stc.org/publications/products/salary-database to download or purchase today!
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Anaheim, California: Hometown of the Mouse who Built the Disney Empire

BY ART HOFFMAN | *Senoir Member*

ATTENDEES OF STC Summit '16 will be right in the middle of the Anaheim Resort with all that it offers. The most famous attraction is Disneyland, which is celebrating its 60th anniversary this year, and the Disney California Adventure theme park. Millions of visitors each year come to enjoy the handiwork of Disney's Imagineers who created rides based on popular animated and live action movies.

There is much to do in Anaheim and surrounding Orange County, but in this article, let's focus on the offerings nearest Disneyland, or as we call it, the "Mouse House." Downtown Disney and the Grand Californian Hotel are located just outside of the theme parks. We often go there just to watch the impressive fireworks display launching at about 9:30 every evening.

The Downtown Disney skyline resembles the Art Deco architecture found in many large cities in the United States. Bold signs and colored accent lights create a special visual treat at night. Walking through the stylized buildings, you will come upon the Uva bar which looks like a stage centerpiece lifted right out of a Busby Berkeley musical. You are likely to encounter musicians along the way, adding the charm of live music to the faux city ambiance. A large outdoor stage features musical performances ranging from swing to rock-n-roll.

There are many different shops to browse along the way, including a gigantic company store with Disney character images or the Disney logo on every imaginable type of merchandise. One of the most fun stores is the Lego building with its huge figures made from thousands of little plastic blocks. This is a great place to pick up a gift to bring back to little Imagineers at home. On my most recent downtown trip, I spotted the Elsa and Anna store, which is fully stocked with clothes and accessories to thrill little ice princesses.

Disney©

Main lobby of the Grand Californain Hotel

Food offerings in Downtown Disney include full-service restaurants, casual dining, and snacks. The first two eateries you will see are the Fox Sports Grill and the jungle-themed Rainforest Café. A few more steps brings you to Brennan's Jazz Kitchen with its New Orleans inspired menu and live jazz and blues music. Right next door you will notice the aroma of chicory coffee and beignets just like in the French Quarter. Tortilla Jo's is across the way for those wanting South of the Border fare. You aren't done yet. Further on is the upscale Catal restaurant with its outdoor bar, and Naples which offers fine Italian dishes and pizza.

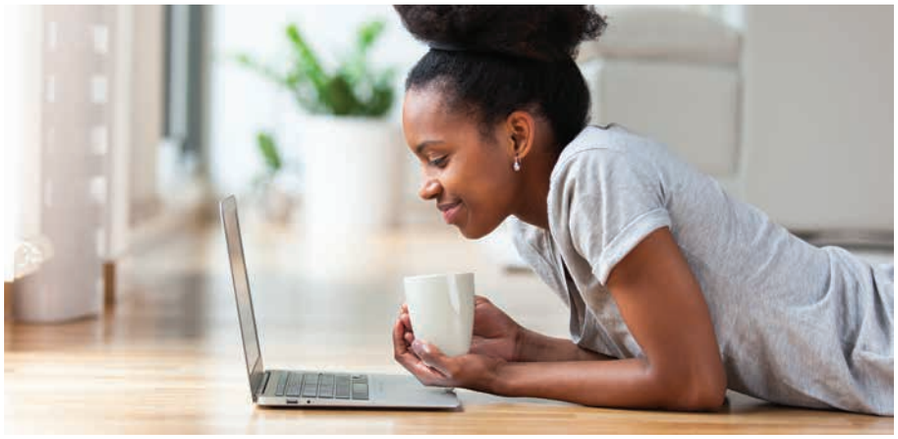
Find the side entrance to the Grand Californian Hotel where you can see beautiful woodwork and a massive fireplace modeled after classic old lodges like Yosemite's Ahwanee Hotel. A full-service bar is inside the hotel and restaurants along an outside gallery. The Napa Rose is the prime choice for gourmet dinner offerings that can be paired with wine from their extensive selection. Next door is the Storytellers Café with a more casual menu and classic décor of silhouettes and warm colors.

Finally, there is a hidden gem easily missed by most visitors. A few minutes walk into the adjacent Disneyland Hotel complex brings you to Trader Sam's tiki bar and restaurant. Similar in feel to the Disneyland's Enchanted Tiki Room, but without the singing robo-birds, it offers real relaxation on a torch-lit tropical patio with exotic drinks. Steps away is a huge rock fireplace surrounded by comfy couches. This is a little corner of paradise to have a quiet conversation with Summit friends, seemingly miles away from the frenzy of commercialism surrounding the Mouse House.

The Technical Communication Summit is being held 15 May to 18 May 2016.

Art Hoffmann lives a few miles from Disneyland and the Anaheim Resort district. Art is the current secretary of the Orange County STC Chapter which is one of the Summit's local hosts.

That's [Unethical?] Edutainment!



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BY JESSIE LAMBERT | *Guest Columnist*

KEANU GIST RECENTLY graduated from Boston University with a Bachelor of Fine Arts in graphic design and a minor in biology. His goal is to use his talents as a scientific illustrator to make science accessible to a broad audience. As a recent graduate, Keanu already has a moderate portfolio with several scientific illustrations, and he hopes to continue building upon this work. Rather than immediately accept a job he knows he wouldn't like, he decides to move in with his parents, where he spends much of his time applying for jobs and searching for relevant freelance opportunities. He takes on a few freelance jobs primarily to add artifacts to his portfolio, even though the work he does (illustrations of pets and, once, an illustration of a historic building) is not in keeping with the work he hopes to do in the future.

One evening he receives a call from his high school biology teacher Mrs. Bates. After seeing his ad in the *Bentoak Tribune*, she calls to ask if he would be willing to take on a freelance project pro-bono as a special favor to her. She is creating a study guide to prepare her advanced placement biology class for the standardized biology test, but she also hopes to publish it online to make it available to larger audience. She wants him to create illustrations of both a plant and an animal cell.

Since the Bentoak Public School District has always been underfunded, Keanu feels compelled to accept the pro bono project. He also knows that the illustrations he creates will be excellent artifacts to include in his portfolio, so he accepts without hesitation.

As a gesture of appreciation, Mrs. Bates invites Keanu to visit her class the following week. During the class visit, Keanu meets several of Mrs. Bates students; many are interested in studying biology as either a major or a minor in college. He feels satisfied with his decision knowing that these students share his passion for the sciences.

After the class visit, Keanu shows Mrs. Bates his concept designs. So far he has created basic sketches of the plant and animal cell, which demonstrate his sharp attention to detail. To his disappointment, Mrs. Bates frowns down at his sketches. She asks that he use more vibrant colors and place the cells in a short comic strip discussing, perhaps, the work they do each day or, even better, arguing about which cell works the hardest. She then tells him to remove a few features from the cells that hadn't appeared on the state test in recent years. Keanu protests, insisting that he should present the science in its truest, most serious form, the better to educate students. Mrs. Bates tells him that her main concern is helping her students pass the state test. She doesn't believe her students need an overload of information, and she wants to keep the study guide as engaging as possible.

Keanu has a decision to make. He knows that Mrs. Bates won't be able to pay an illustrator to create these designs for her study guide. He believes that, if he continues developing his realistic illustrations, Mrs. Bates will have no choice but to use them. It would create a rift in their professional relationship, but at least the students would have what Keanu believes to be better study materials.

However, Mrs. Bates has been teaching for nearly thirty years and has always done her part to help her students pass the standardized test. While he trusts that she knows what she's doing in that regard, he knows that she hasn't been in a college environment in some time and likely doesn't understand the rigor of the introductory biology classroom, an environment many of her students will be entering into soon. He knows the cartoon illustrations she has in mind will not prepare them for that environment. What should he do?

This column features ethics scenarios and issues that may affect technical communicators in the many aspects of their jobs. If you have a possible solution to a scenario, your own case, or feedback in general, please contact column editor Derek G. Ross at *dgr0003@auburn.edu.*

Edutainment and Standardized Tests

Edutainment "combines aspects of education and entertainment into products and experiences that seek to improve learning by making it not just painless but also pleasurable" (Beato). Examples are everywhere, from documentaries like *Blackfish* and *An Inconvenient Truth* to educational apps, such as Anatomy 4D, which allows users to take an interactive journey through the human body. This "academization of leisure" (Beato) emerged with the popularization of television. As television sets slowly became a staple in American homes, many topics usually reserved for print medium (politics, news, education, etc.) found their place on the new format. As educational programs gained popularity, producers shifted their focus from merely providing information to providing information in an entertaining format. This allowed producers to compete for higher ratings and more program funding. Thus began the edutainment movement. Now edutainment takes on a variety of formats, from television programs to video games to interactive apps. With every new technological advancement, there seems to be a new form of edutainment riding on its coattails.

Mrs. Bates's decision to use edutainment as a means to prepare her students for standardized tests is far from a new concept. Edutainment is on the rise in the American school system, and this may seem like an improvement over more traditional modes of education. If the goal of edutainment is to engage learners and the goal of school systems is to provide students with an education, then the marriage of the two certainly makes sense. However, does a more entertaining learning experience translate to a more useful one? Trotter (1991), among others, would argue that it doesn't. Edutainment, while enticing, can overwhelm students with too much information or even underwhelm them with too little depth. Most modes only require students to recall information to pass interactive quizzes. Such programs encourage memorization rather than understanding.

While most would agree that we should ask more of our students than basic memorization, standardized tests generally operate on the same modes of testing, prioritizing recall over understanding. Does this mean that educators should turn to edutainment as a way to train students to pass the standardized tests? If the answer is yes, then should educators only teach students what will appear on the tests, as Mrs. Bates wants to do? Or should educators instead offer students a more rounded education, even if this means focusing less on what students will be tested on?

More Questions to Consider

What should Keanu do? Should he continue creating the realistic illustrations to prepare Mrs. Bates's students for the college learning environment? Or should he listen to his client and focus only on training the students to pass the standardized tests? Should he back out of the position entirely?

This scenario leads us to yet another question: As technical communicators, do we possess any authorship over the work that we produce? I'm by no means the first to pose such questions regarding the nature and value of our work. Johnson-Eilola points out the many problems with technical communicators being considered as service and/or support workers who have little to no authorial power. Not only do these role descriptions fail to encompass the varied skillset technical communicators possess, but such descriptions also command less respect, less value. In the ethical scenario presented, it's obvious that Mrs. Bates considers Keanu to be a service worker rather than a contributor to her project. This treatment is not atypical of technical communicators. Nearly ten years after Johnson-Eilola explored the concept of the value technical communicators bring to the workforce, we're often still classified as service or support workers. To combat this, Johnson-Eilola suggests we classify our work as symbolic-analytic. Such work entails the ability to "identify, rearrange, circulate, abstract, and broker information" (Johnson-Eilola), which all technical communicators should have the skill to do. Therein, Johnson-Eilola believes, lies the true value of technical communication, a type of value that will command more respect and offer us more authority over the projects we take on.

Editorial Note

Edutainment is the cutting edge of modern education … or is it? What happens to knowledge production when we're always striving for the cute, the whimsical, the creative? What happens to our knowledge workers when they have to be as much entertainer as teacher, or to our workforce or potential theoreticians when they've been raised on carefully tailored, creative interpretations of reality? What is the technical communicator's role in the production of new knowledge?

These questions, and more, surface in Jessie Lambert's column in this issue, where she tells the story of a budding scientific illustrator asked to create modified images for students. Where our last column, a double feature on expeditious ethics, asked us to consider how time shapes our work and ethical responsibilities, this column asks us to consider how we might be (re)shaping information with an eye toward entertainment, and if that reshaping adds value. As she concludes, Lambert points us back toward Slack, Miller, and Doak's vital piece on authorship to ask us how new and emerging communication strategies change the way we think about authorship in our profession.

As always, we welcome your responses. Let us know your answers to the questions we've posed, your thoughts on our roles as technical communicators in general, or send us your own ethics cases or column ideas. Please send your responses to derek.ross@auburn.edu. *Responses will be printed in an upcoming issue of* Intercom *as space permits.*

—Derek G. Ross

While this illustrates the root of the problem driving the ethical scenario presented (that, as technical communicators, we are generally considered to be service or support workers rather than contributors or authors), it doesn't bring us to a solution. How much authorship, if any, do we have? Slack, Miller, and Doak offer some insight by asserting that whether we are given attribution or not, technical communicators are authors because we play a significant role in knowledge production, a role made very clear in the ethical scenario presented here. As technical communicators, we choose how to shape and deliver information to our target audience, and these decisions can be the difference between helping the audience understand and causing confusion.

Slack, Miller, and Doak offer a reasonable argument for why technical communicators should be considered authors, but they don't cover how much authorship we possess or even when we possess this authority. The Society for Technical Communication makes an attempt at doing this by stating that "we attribute authorship of material and ideas only to those who make an original and substantive contribution." Even this is problematic, and we're still left with several questions. What constitutes an original or substantive contribution? What rights do we have as authors? Circling back to the ethical scenario, does Keanu (and, by extension, technical communicators) have the power to disregard the client's request to prioritize the recipients' expected needs? Or is this a step too far?

JESSIE LAMBERT *is pursuing the Master of Technical and Professional Communication degree at Auburn University. She serves as a graduate writing center consultant as well as a teacher of record for English Composition I and II. Her research interests include visual rhetoric, composition pedagogy, and the ethics of risk communication.*

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"MY DOCUMENTATION STAYS ON TIME, ON SCHEDULE, AND IN BUDGET THANKS TO THE STC SUMMIT"
"When you get students, academics, and practicing professionals all together in the same space for the Summit, the energy is amazing. I always learn a lot from the presentations, and my manager really appreciates what I bring back to the workplace. He has me summarize the sessions I attended in writing and passes the summary up the management chain. The knowledge I share from the Summit helps my company's documentation stay on time, on schedule, and in budget."
Louise H Tincher
MY NAME IS LOUISE TINCHER AND
I'M AN STC MEMBER
http://summit.stc.org

The ADA at 25: Technical Communicators as Advocates

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BY LINDA ROBERTS | *Associate Fellow,*
LISA COOK |*Fellow,* and
TYLER WILLIAMSON | *Guest Columnist*

TWENTY-FIVE YEARS AGO, on 26 July 1990, President George H. W. Bush signed the Americans with Disabilities Act (ADA), designed to meet four goals for people with disabilities: equal opportunity, full participation in the community, independent living, and economic self-sufficiency.

Twenty-five years after the passage of the ADA, great advances have been made for people with disabilities. This landmark civil rights law enables people with disabilities to participate in the workforce and in their community.

But what advances has the field of technical communication made to make the workplace better for people with disabilities? This column looks at how technical writers contributed to making the world a bit more accessible.

Providing an accessibility section in a document or a suite of documents that summarizes the accessibility features for an application helps a user understand the state of accessibility for an application and documents any issues in the application. Users of assistive technologies tend to look for an accessibility section not only to figure out workarounds for a product, but also to understand ways to make their general workflow more efficient.

An accessibility section may benefit users who are not its primary audience. Power users may examine an accessibility section for items such as keyboard shortcuts and utilities like landmarks to make their work more efficient.

Technical communicators have often become advocates, educating application and Web developers on the need for interactivity with assistive technologies such as screen readers or supporting users' custom color choices, to address low vision or color blindness issues.

Our profession's demographics have also helped raise awareness of the need for accessibility information technology (IT). Professionals, in general, including technical communicators, are staying in the workforce longer. Many develop age-related mobility or visual impairments that can be addressed by accessible IT. Because we experience these issues, we can lobby for changes in the tools we use and the products we support, ultimately helping end users with similar issues.

The U.S. Access Board's Section 508 Refresh, announced in 2015, will bring new attention to public and institutional organizations' obligations. Successful litigation against inaccessible websites and online applications—increasingly in the private sector—will drive further innovation. Technical communication follows the leading edge of technology advances. By increasing our own awareness of accessiblity (also commonly known as A11Y) and our companies' risks and opportunities, we can further demonstrate our value.

This column shares information about accessibility requirements and techniques, and introduces standards and policies that might affect your products. If you have feedback, contact Linda Roberts at *lerober1@yahoo.com* or Lisa Cook at *Lisa.Cook@sas.com.*

Ask a Tech Comm Manager

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BY KIT BROWN-HOEKSTRA | *Fellow* and **CINDY CURRIE** | *Fellow*

Dear TC Manager:
I'm looking for a new job in technical communication, and every job asks for a different tool, many of which I don't know. Why is there such a tool focus and how should I handle it when applying for jobs?
—Searching for a Job

Dear Searching:
The tools are listed in the job ad because 1) it's easy for human resources to check it off the list, and 2) we want you to know what tools we use. When hiring, your knowledge of the tool is usually not as critical as other criteria because we know that you can quickly learn the tool, especially if you know other tools in the same category.

At the same time, we are looking for self-starters. So, if you don't know the tool, download the free trial version, take a tutorial (from the manufacturer, *www.lynda.com*, *www.ed2go.com*, or one of the many free online courses known as MOOCS), and consider creating a writing sample using that tool. Once you have played with the tool, you can honestly put "familiar with Tool X" on your résumé. If you are asked about your experience with the tool during the interview, talk about what you've learned in using it, and make the point that you want to learn more.

Dear TC Manager:
I have to interview a subject matter expert so that I can get the information I need to complete my project. The deadline is rapidly approaching and the SME keeps cancelling our meetings at the last minute, and when I send a draft, includes rude or unhelpful comments but doesn't tell me how to fix the error. What should I do?
—Frustrated Interviewer

Dear Frustrated Interviewer:
This can be a challenging situation. Many SMEs are hired for their technical expertise and sometimes have less than stellar communication skills. Before talking to the project manager or escalating the situation to your manager, try the following:

- Make sure that you are prepared for the meeting with the SME. Do your research and clearly identify the questions that you need the SME to answer. Try to resolve as many of your questions without involving the SME. (Are there technical and functional specifications or other information you can use as reference material?) And, be sure to send a reminder to the SME that their input is needed to meet the project schedule (a key measure for all project team members!), and to ensure the technical accuracy and completeness of the information.
- Consider creating a checklist that the SME can fill out. Make it as easy as possible for the SME to help you.
- If you are co-located, walk over to the SME's office and talk to them face to face. Explain to them what types of information you need from them. Set a boundary about the types of comments that are unacceptable (be professional about it). For example, if the SME just wrote "this sucks" on your work and didn't explain what the issues were, point out to them that you need construc-

Ask a Tech Comm Manager is an advice column geared toward answering all those questions you have, but might be uncomfortable asking. We glean the questions from social media, forums, and most importantly, from you, dear reader. If we don't know an answer, we will interview experts and get information for you. Send us your questions to *kitbh.stc@gmail.com* or tweet them to *@kitcomgenesis* or the hashtag *#askTCmgr*.

tive feedback in order to do your job and that they are responsible for the technical accuracy, so it's in their best interest to help you get it right.

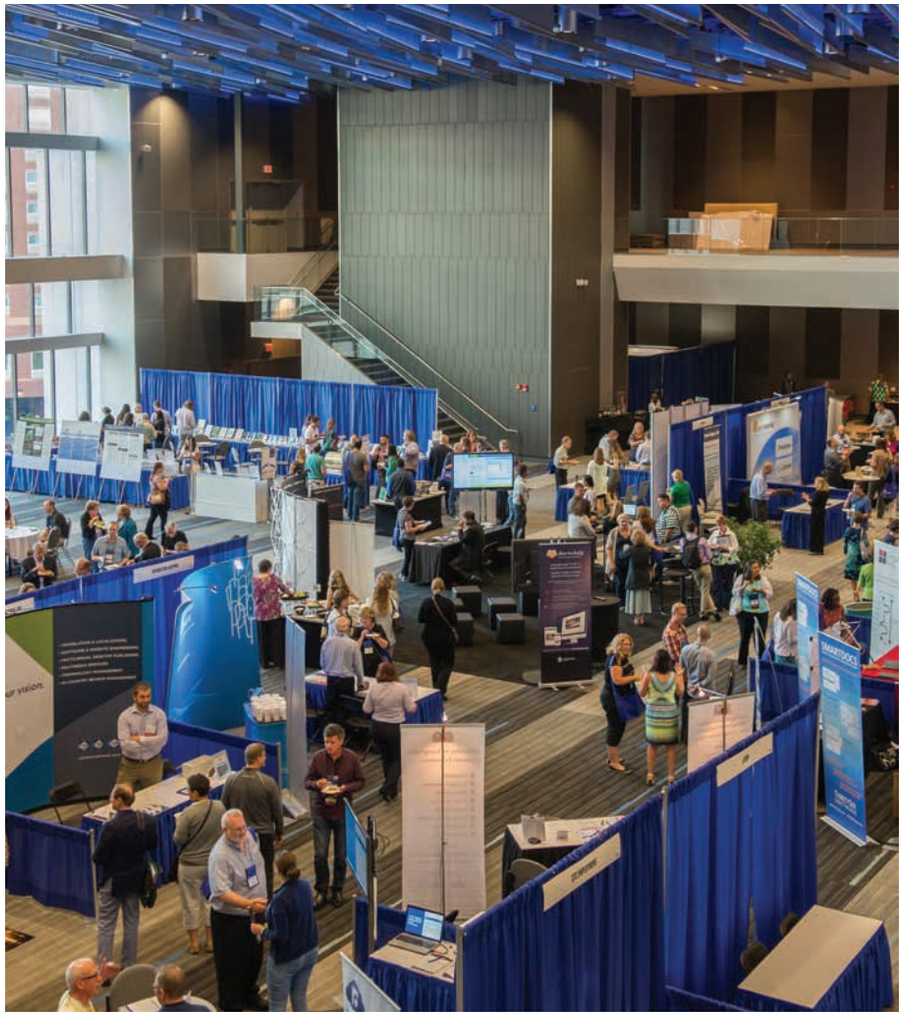
If talking to them hasn't helped the situation, you might need to approach the project manager or your manager. When talking to managers, stick to the facts, stay calm, tell them what you have tried, identify what you want as a resolution to the problem, and ask for advice. Then, do what they recommend. Also, start copying the appropriate management team members on the requests.

Dear TC Manager:
I really want to go to the STC annual conference in May. How do I approach my boss about this?
—STC Member

Dear STC Member:
We are delighted that you want to come to the conference! Be sure to look us up while you are there.

The best way to get your boss to pay for the conference is to show what is in it for them and for the rest of your team. You can create a business case to do this. You want to keep it to 1-2 pages, while providing the information your boss needs:

- **Opportunity:** Write 1-2 sentences explaining the conference and why you think it would be helpful to the team for you to go. Include the URL for the STC conference site.
- **Benefits:** List the benefits of going. Examples might include combining the trip with a client visit or user group meetup, doing brown bags for the team with the Virtual Summit recordings, identifying new skills and trends that your team can build on, networking, identifying potential new team members, and so on.
- **Risk Assessment:** How will this affect your work and deadlines? (Hint: present a plan for getting your work done while you are gone.)
- **Dates/Location:** When/where is the conference?



Networking at the STC Summit.

- **Costs:** Provide all the costs associated with it.
- **Call to Action:** Request the funds and time away from the office to attend.

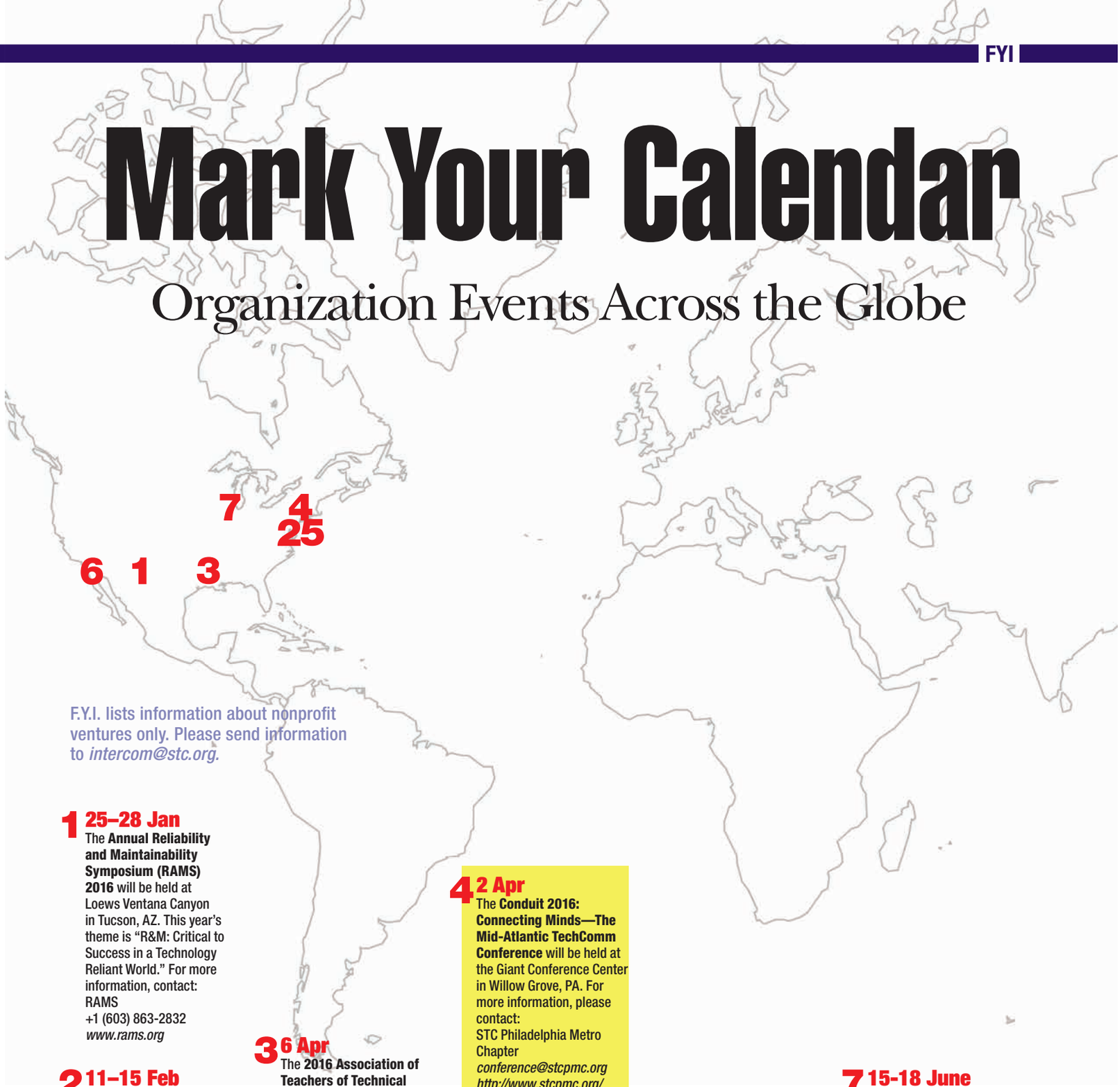
Remember, this is a negotiation, so think about all the questions and objections your manager might have and be fully prepared to address them. What is your bottom line? Consider if you would be willing and able to fund part of the trip yourself. If yes, put this fact on the table during a discussion with your manager after they've read your business case and you have a good indication of whether approval is forthcoming or some serious negotiating needs to take place. By offering to contribute some of your own resources to the trip, you would be making an investment in yourself and your career, and it could sway a difficult discussion in your favor.

KATHERINE (KIT) BROWN-HOEKSTRA *is an STC Fellow, the 2015–2016 Immediate Past President, and an active mentor. For her day job, she is principal of Comgenesis, LLC, a consulting company that works in the space between technical communication and localization to help clients build better processes and global-ready content so that they can reach their customers wherever they live and work.*

CINDY CURRIE *is an STC Fellow, STC Past President (2009–2010), and currently a member of the STC Nominating Committee. Cindy's day job is as a senior program manager for Hewlett Packard Enterprise where she manages the releases of numerous projects in the HPE Virtual Private Cloud portfolio.*

Mark Your Calendar

Organization Events Across the Globe



F.Y.I. lists information about nonprofit ventures only. Please send information to *intercom@stc.org.*

1 25–28 Jan
The **Annual Reliability and Maintainability Symposium (RAMS) 2016** will be held at Loews Ventana Canyon in Tucson, AZ. This year's theme is "R&M: Critical to Success in a Technology Reliant World." For more information, contact:
RAMS
+1 (603) 863-2832
www.rams.org

2 11–15 Feb
The **2016 American Association for the Advancement of Science (AAAS) Annual Meeting** will take place at the Washington Marriott Wardman Park in Washington, DC. The theme is "Global Science Engagement." For more information, please contact:
AAAS
+1 (202) 326-6450
meetings@aaas.org
http://meetings.aaas.org

3 6 Apr
The **2016 Association of Teachers of Technical Writing (ATTW) Annual Conference** will take place at the Hilton of the Americas in Houston, TX. The theme is "Citizenship and Advocacy in Technical Communication." For more information, please contact:
ATTW
http://attw.org/conference/
Conference co-chairs
Godwin Agboka,
agbokag@uhd.edu
Natalia Matveeva,
matveevan@uhd.edu

4 2 Apr
The **Conduit 2016: Connecting Minds—The Mid-Atlantic TechComm Conference** will be held at the Giant Conference Center in Willow Grove, PA. For more information, please contact:
STC Philadelphia Metro Chapter
conference@stcpmc.org
http://www.stcpmc.org/

5 8–10 Apr
The **2016 International Society for Performance Improvement Annual Conference** will take place at the Loews Philadelphia Hotel in Philadelphia, PA. For more information, please contact:
ISPI
+1 (301) 587-8570
info@ispi.org
http://ispi.org

6 15–18 May
The **Society for Technical Communication** will host its 63rd Annual Summit at the Anaheim Marriott in Anaheim, CA. For more information, please contact:
STC
+1 (703) 522-4114
http://summit.stc.org/

7 15-18 June
The **2016 American Society for Indexing Annual Conference** will take place at the Conference Chicago University Center in Chicago, IL. For more information, please contact:
ASI
+1 (480) 245-6750
info@asindexing.org
http://www.asindexing.org/conference-2016/

* STC-related event

My Technical Communication Journey

BY JACKIE DAMRAU | *Fellow*

LIFE IS INTERESTING and then we find a career. As a young girl, I wanted to follow in my mom's footsteps. I thought she was the greatest secretary. At an early age, my parents bought me a manual typewriter. I took my mom's business school typing books and taught myself to type. I did the same thing with her shorthand books, not knowing that learning that chicken scratch would save me in all my careers in notetaking, because I can take down so much information using shorthand.

All throughout school, I excelled in business classes, but science and math were not my friends; they still aren't. Two days after high school graduation, I was entering business school to get a legal secretary certificate. I achieved that goal and got my first legal secretary job. It was not what I thought it would be, but no job is ever exactly what we think. I did enjoy the secretary part, but the legal part was a bit much. I left that field and "fell" into jobs that required word processing and good English skills (typing other people's stuff and editing as I went). That held me for a while, then I landed my first technical writing/editing job.

My new career began. I started taking some introductory English classes and a single technical writing class at the local community college. No certificate program or degree existed for technical communication back in the dark ages. Yet I pushed myself to read and learn as much as I could. I made my own errors in grammar, but I listened and honed my skills. After years of doing technical writing, I had an opportunity to move into the instructional design field.

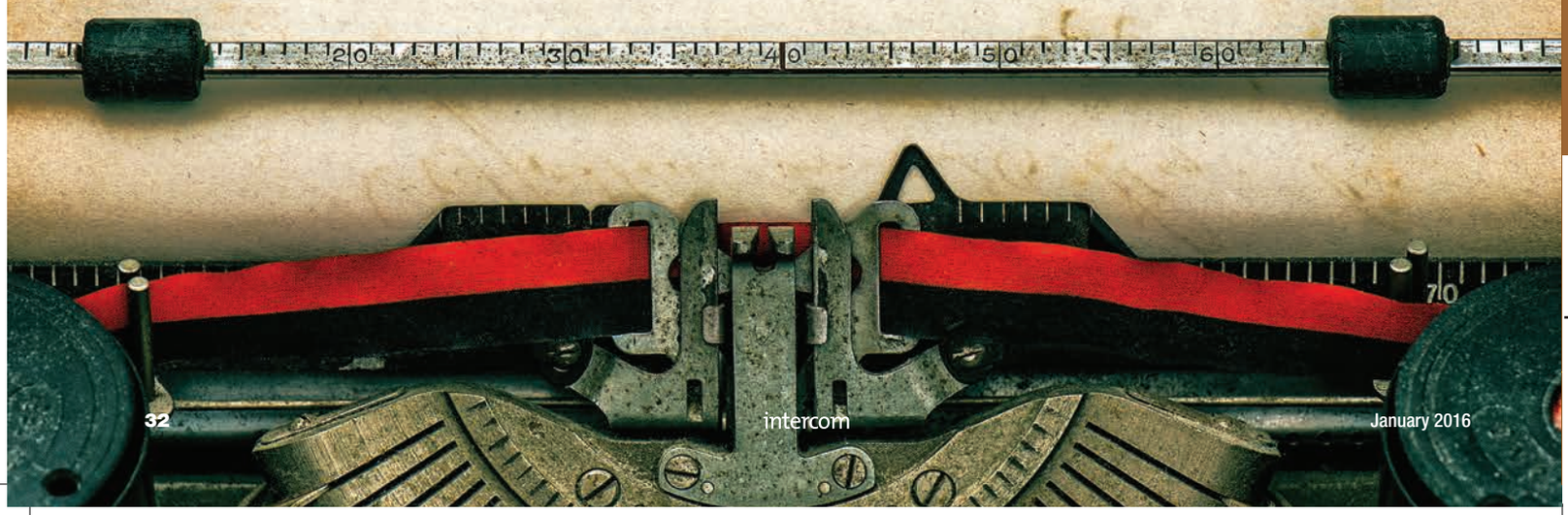
Instructional design is a branch of technical writing, and through it, I was able to expand my knowledge to provide technical content for different audiences. I earned an online certificate in information design. Time moves on, and so did my career.

I again "fell" into my current career as a business systems analyst. I had an employer who encouraged me to learn business process modeling (BPM), and I hold a certification by a leading BPM software company on two of their products. I continued using my technical communication skills in gathering requirements and modeling processes.

Eventually, I gained a role with that leading BPM company traveling through North America, but family responsibilities entered my life in the forms of elder care, parenting, and permanent custody of my two grandchildren. Long-term travelling was no longer possible, so I've settled down to work for the leading global commercial real estate company, CBRE. I have the best of both worlds, being able to write requirements and use my process modeling and technical communication skills.

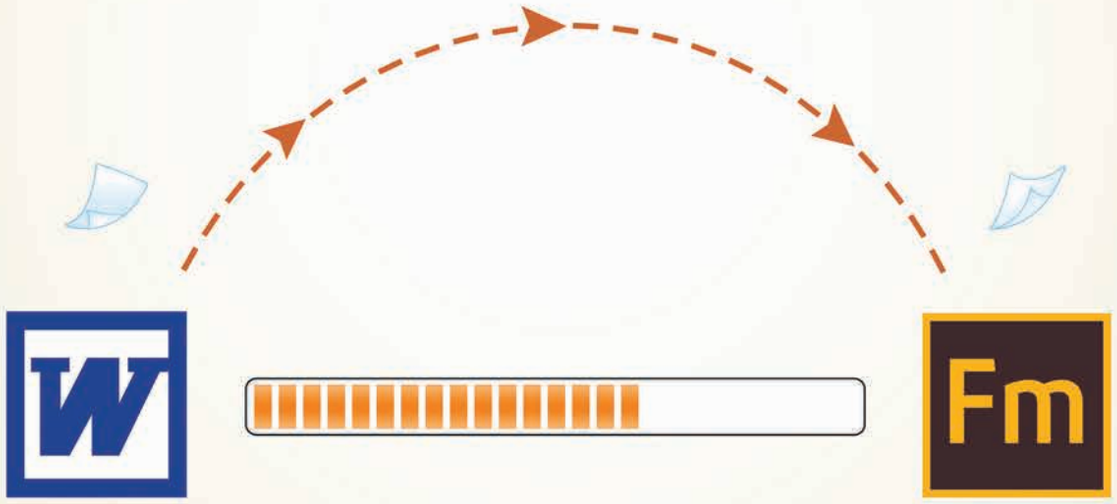
Where does STC fit here? I have been part of STC since 1983 with a break in between, returning fully in 1993. My service to STC has been at both the local, virtual, and international levels. I am currently the book review editor for the *Technical Communication* journal, where I get to work with a great group of reviewers, as well as with many publishers. I love the breadth and depth that STC membership provides, allowing me to continue to learn new areas and to share my own knowledge with others.

Thanks, STC! You're worth the personal investment.



shutterstock.com/ LiliGraphie

Adobe FrameMaker (2015 release)



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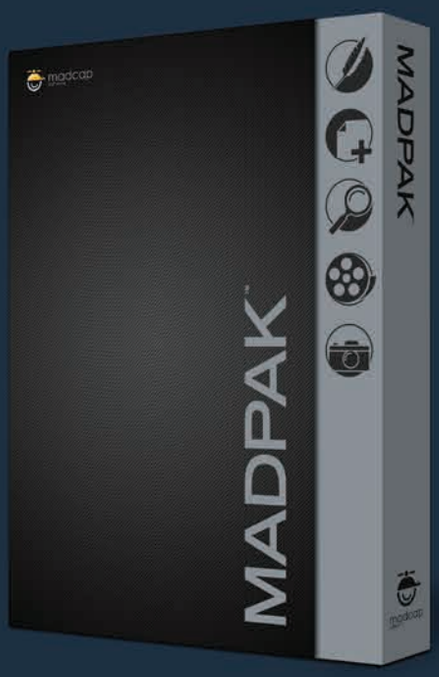

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